

Southern California Edison

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**2001 Energy Efficiency Programs  
Second Quarter Report**

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## **Section 1: Executive Summary**

### **Introduction**

In response to the expected energy supply shortages and high prices for electricity over the next few years, SCE has refocused the energy efficiency program portfolio on maximizing energy savings and demand reductions potential for all customers. The California Public Utilities Commission has provided SCE, and other California investor-owned utilities; the flexibility to modify program design and funding levels to optimize the program portfolio's potential. With these program modifications in place, SCE expects to achieve approximately 390 million kWh of net annualized energy savings and over 90 MW of demand reductions in program year 2001.

During the first half of 2001, SCE's energy efficiency programs achieved nearly 350 million kilowatt-hours (kWh) of net annualized energy savings and 104 MW of net demand reductions. In addition, the Summer Initiatives employed within SCE's service territory have achieved approximately 92 million kWh of annualized energy savings and 66 MW of demand reductions.

### **Residential**

For 2001, SCE has expanded the residential rebate offerings under its Home Efficiency Rebate program. Customers can now sign-up for a rebate on a number of energy efficient appliances and equipment by calling a toll-free number or on-line at [www.sce.com](http://www.sce.com). SCE also is continuing its very successful refrigerator recycling program. As added incentive to customers, SCE is offering a 5-pack of compact fluorescent bulbs to customers who recycling their refrigerator or freezer. SCE has also revised the residential energy guide to provide "Quick Tips" on how to conserve energy and participate in energy efficiency programs. The Residential Contractor program for single-family residences is now focused on delivery duct test and repair through qualified residential contractors. In the promotion of the residential lighting program, SCE continues to use an upstream strategy by which customers are offered discounted energy efficient lighting products. As a result of these program activities, SCE has achieved approximately 93,000 megawatt-hours (MWh) of net annualized energy savings and 41.5 megawatts (MW) of net demand reductions during the first half of 2001.

### **Nonresidential**

To maximize energy and demand savings, SCE has made a number of significant programmatic changes to the nonresidential portfolio. One of the most significant changes is the expansion of customer eligibility to large customers under the Express Efficiency rebate program. SCE also continues its very successful Summer Initiative LED traffic signal rebate offering through Express Efficiency. Additionally through Express Efficiency, SCE has implemented "Blitz" initiatives promoting specific measures (e.g., window film) targeted to the smaller business customers. The Standard Performance Contract program requirements were also modified to simplify the application process, which now includes measurement and verification as an optional feature. As a result of these program modifications, SCE has achieved approximately

244,000 MWh of net annualized energy savings and 60.5 MW of net demand reductions during the first half of 2001.

### **New Construction**

In 2001, SCE has significantly increased funding in the residential and nonresidential new construction sector. In the residential new construction market, SCE continues to offer incentives to homebuilders to encourage them to build Energy Star qualified homes. SCE has also implemented a manufacturer incentive program which encourages air conditioning distributors to sell higher efficient units to builders at reduced prices. In the nonresidential market, SCE continues to offer the very successful Savings By Design program. Although the new construction activities have a much longer lead-time before energy savings are realized, these programs capture significant lost opportunities. During the first half of 2001, these programs have achieved approximately 13,700 MWh of net annualized energy savings and 1.9 MW of net demand reductions.

### **Statewide and Crosscutting**

SCE, along with other investor-owned utilities, continue to coordinate programs on a statewide basis. However, for 2001, key strategies are being employed under the statewide programs by various utilities, including SCE, that are uniquely designed to optimize energy and demand savings. For SCE, some of these strategies include “Blitz” initiatives for small businesses, expansion of the LED traffic signal rebate offering, and the inclusion of large customers in the Express Efficiency rebate program.

Under the crosscutting programs, SCE initiated a third party solicitation process in November 2000. SCE believed this early solicitation would provide winner bidders the maximum potential time to implement their initiatives. By the end of March, ten winning bidders had been notified of their selection and invited to begin working on their project plans. In addition, four previously awarded third party initiative projects were selected for additional funding.

In light of the renewed focus on immediate energy and demand savings, SCE has also reduced its funding for the promotion of energy efficient emerging technologies. Nevertheless, SCE is committed to the continued promotion of such technologies and, to that end, will continue to actively participate in the Emerging Technologies Coordinating Counsel with other industry leaders. SCE will also promote a limited number of technology showcases during 2001.

### **Market Assessment and Evaluation**

Two statewide studies were completed and distributed in second quarter 2001. The California Lamp Report 2000 provides data never before available on national and state trends in sales of incandescent, halogen, and compact fluorescent lamps (CFL). The most notable finding is that CFL sales rose by 27% in California versus 11% nationally from 1999 to 2000.

The Process Evaluation of the PY 2000 Residential Contractor Program (RCP) examined both the single-family and multi-family elements of the program. On the single-family side, the study finds that the program has given a real boost to the development of an infrastructure to provide duct diagnostic and repair services. Also, contractors highly value the training provided by the

program. On the multi-family side, participating multi-family contractors are sufficiently satisfied with the program to continue participating. However, contractors pointed out that since late 2000, the multi-family RCP faced competition from the Summer Initiative Program, which had the advantage of more attractive incentives and payment terms. For both elements of the program, the evaluation provided recommendations for improvements to program design.

### **Summer Initiative**

In 2001, SCE continues to oversee various offerings under the Summer Initiative implemented during 2000. These Summer Initiatives include: Residential Refrigerator Recycling, Pool Efficiency Program, selective third party initiatives, LED Traffic Signal Rebate Program, Campus Energy Efficiency Project, Hard To Reach Program, Beat The Heat, and California Oil Producers Electric Cooperative. By the end of the first half 2001, the Summer Initiatives had installed or committed over 92,000 MWh of annualized energy savings and 66.5 MW of demand reduction.

## Section 2: Residential Program Area

Southern California Edison Company's residential programs promote the use of energy-efficient measures by consumers. The specific programs include: Residential Heating and Cooling, Residential Lighting, and Residential Appliances and Residential Retrofit and Renovation.

### ***Residential Heating & Cooling Systems***

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(for detail see A.00-11-043, p. C-5)

SCE's Residential Heating & Cooling Systems program consists of a comprehensive, coordinated set of strategies focused largely on increasing homeowner awareness of energy efficiency opportunities. Energy and cost savings in this market are achieved through: (1) increased availability and promotion of higher efficiency equipment at the time of equipment replacement by suppliers; (2) reductions in the search costs of customers in the market for efficient replacement equipment; (3) improved equipment sizing and installation practices, particularly for central air conditioners and heat pumps; and (4) ongoing proper operation and maintenance of HVAC systems.

### ***Program Elements***

<b>ELEMENT NAME</b>	<b>ELEMENT ACTIVITY</b>
Residential Audits	See below
CHEERS	See below
Mass Market Information	See below
Emerging Technologies	See Crosscutting Programs
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

### **Residential Audits**

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(for detail see A.00-11-043, p. C-7)

### ***Program Element Summary***

Residential energy surveys take various forms such as mail-in, in-home, phone, or online and provide customers (including moderate income) or their children (e.g., school-based audits) with energy efficiency information to help them reduce their energy bills. The surveys also provide a segue for offering other energy efficiency products and services such as residential rebates and retail outlets that feature ENERGY STAR<sup>®</sup> qualified products. Marketing and promotion strategies include the ENERGY STAR<sup>®</sup> Mobil Education Unit, e-mail promotions, direct mail, bill messages or inserts, print media advertising, Internet, local governments, phone centers, and ethnic, trade, and community associations.

In light of the immediate need to reduce energy consumption by all customers and including residential, SCE expects to see greater demand for energy surveys especially for in-home surveys. Faced with this greater demand, SCE will aggressively promote its on-line survey so to allow many more customers to participate in the program.

***Activities, Accomplishments, Market Progress, & Modifications***

- To date, customers have completed over 19,000 mail-in, in-home, phone and online surveys representing 2,700 MWh of net annualized energy savings.
- Solicitations for Mail-In and In-home surveys have been sent to 205,000 customers. SCE’s plan is to send direct solicitations to an additional 160,000 customers for In-home and Mail-in surveys by year-end. In July direct solicitations will also be made to approximately 250,000 customers for Online surveys in addition to bill inserts in August. Radio commercials run in May and ongoing through summer have contributed to customer survey participation.
- The Online Survey was enhanced to provide additional information and help customers achieve their energy savings under Governor Gray Davis’s 20/20 summer rebate program. Enhancements include a breakdown of the customer’s summer 2000 cost by appliance, summer savings recommendations and links to SCE’s 20/20 and account history web sites.

The results from SCE residential audits for the second quarter are:

Survey	Completed Audits
In-Home	3,592
Mail-In	11,018
Phone	1,241
Online	3,049

- The Green Schools, Green Communities Program in San Bernardino County has begun with twelve schools selected to participate in the Rialto School District. They include four traditional and alternative high schools, two middle schools, and six elementary schools.
- At the Rialto Alternative Education Center, a group of students has been meeting with Green Schools staff since May to develop plans for promoting energy efficiency in the schools and community. They are being trained on both energy efficiency principles and applications and on how to communicate opportunities to save energy to community members and other students.
- The two-day Green Schools workshop for teachers, custodians, administrators and students has been planned for August 20-21.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,400

Revised: \$1,400

## **Residential - California Home Energy Efficiency Rating System Program**

(for detail see A.00-11-043, p. C-13)

### ***Program Element Summary***

This program supports the California Home Energy Efficiency Rating System (CHEERS), which is a nonprofit, home energy rating service currently offered to the residential retrofit market. Owners of existing homes can obtain a CHEERS rating for a subsidized fee that will evaluate the current energy efficiency of the home. CHEERS will then make recommendations on cost-effective ways, for the buyer or seller, to improve the efficiency of the home and will link the homeowner to beneficial financing via an energy-efficient mortgage (EEM). Additionally, CHEERS offers a variety of audit and energy evaluation tools for the existing home, that are not as comprehensive as the traditional CHEERS rating, but provides a wealth of information to the homeowner.

### ***Activity, Accomplishments, Market Progress, & Modifications***

- Performed 149 traditional CHEERS ratings; completed over 3,000 Energy Wizards (in support of the In-Home Audit program).
- For residential new construction, CHEERS certified and processed documentation for 296 Energy Star Homes built in SCE territory.
- Conducted one New Construction training session and two Lender training sessions.
- In support of the new residential energy standards created by AB 970, CHEERS recruits, trains, and certifies individuals to perform third-party verifications for HVAC compliance options (tight ducts, TXV's, etc.), which were incorporated into the new standards effective June 1, 2001. Currently, CHEERS is the only state-certificated provider for this type of verification.

### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$300

Revised: \$300

## **Mass Market Information**

(for detail see A.00-11-043, p. C-16)

### ***Program Element Summary***

Residential Mass Market Information is energy efficiency information and an education program designed to give customers the power to better manage their home energy costs. The program provides general energy efficiency information to customers and other market actors through the following intervention strategies: Internet, statewide energy guide, ENERGY STAR<sup>®</sup> Mobile Education Unit, coordination with local governments, and an energy efficiency awareness campaign during summer peak months.

SCE plans to implement a two-page “Quick Tips” energy guide that will include suggestions on how customers can conserve energy usage along with references to energy efficiency programs available to them. These revised energy guides will be available in English, Spanish, Korean, Chinese, and Vietnamese.

***Activity, Accomplishments Market Progress, & Modifications***

- Distribution to community-based and trade/ethnic organizations continued through the second quarter via SCE’s Public Affairs and Economic and Business Development organizations, and the Customer Call Center. Distribution of “The Big Picture” statewide energy guide was completed in the second quarter.
- Redesign of SCE’s Residential Energy Guide was completed. The new design provides energy efficiency information in a more user-friendly two-page format.
- The physical design of a mass-market kiosk was completed in June. Graphics design, printing and final production of 100 kiosks will be completed by mid-August. Kiosks will be placed in outlying, rural areas with the intent of reaching underserved customers with energy guides, energy efficiency program information, and CARE applications in English and Spanish.
- Outreach through the second quarter included 116 visits by the ENERGY STAR® Mobile Education Unit (MEU) where customers learned about energy efficiency and were able to obtain a copy of the Energy Guide. A total of 28,032 customer contacts were recorded through the second quarter.
- Residential Energy Guides distributed through the second quarter: 53,799 English; 4,351 Chinese; and 18,851 Spanish. Commercial Energy Guides distributed through the second quarter: 36,235 English; 600 Chinese; and 12,136 Spanish.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,250  
Revised: \$2,615\*

\*includes Consumer Affairs Agency’s statewide media campaign.

## Residential Lighting

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(for detail see A.00-11-043, p. C-17)

SCE's Residential Lighting program seeks to transform specific components of the market for residential lighting products through a coordinated set of program elements. The program's integrated efforts build consumer awareness and market demand for energy-efficient lighting products by working with the supply side of the product chain to make efficient lighting products more readily available to consumers.

### *Program Elements:*

ELEMENT NAME	ELEMENT ACTIVITY
Residential Lighting	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

## Residential Lighting

(for detail see A.00-11-043, p. C-19)

### *Program Element Summary*

The Residential Lighting Program seeks to transform the market for residential lighting products through a comprehensive set of market interventions that are coordinated statewide. The program focuses on three main areas: (1) enhancing the manufacture and competitive pricing of high quality energy-efficient lighting products; (2) enhancing the distribution and marketing of energy-efficient lighting products through established retail channels to consumers; and (3) building consumer understanding of how to purchase and use energy-efficient lighting products.

For 2001, SCE has placed less emphasis on retailer training and education and has significantly increased financial incentives to manufacturers to immediately reduce the price of energy efficient lighting products to residential customers.

### *Activity, Accomplishments, Market Progress, & Modifications*

Through SCE's efforts with lighting manufacturers to buy down the cost of energy-efficient lighting products, customers will receive a \$3 discount per unit off the purchase price of EnergyStar qualified compact fluorescent lamps (CFLs), and a \$10 discount per unit for a torchiere or hardwired indoor/outdoor lighting fixtures. Products are available at:

Costco: shipped 79,500 CFLs March 23rd, completely sold out (35 stores in service territory). An additional 81,000 units are to begin arriving at stores by July 30th.

Wal Mart: shipped 8,000 CFLs March 23rd, nearly sold out (42 stores in service territory).

Sam's Club: shipped 7,500 CFLs March 23rd, nearly sold out (17 stores in service territory).

Lowe's: shipped 25,000 CFLs April 6th, nearly sold out (13 stores in service territory). An additional 36,000 units are to begin arriving at stores by July 30th.

Long's Drugs: shipped 10,000 CFLs April 6th (50 stores in service territory).

Home Depot: shipped 30,000 CFLs April 18th, with another 30,000 in May (65 stores in territory).

Albertson's: shipped 10,000 CFLs May 1st. (171 stores in service territory).

Cal Do-It: 9,000 units are to begin arriving at stores by July 30<sup>th</sup> (8 stores in territory).

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$2,450

Revised: \$3,200

## ***Residential Appliances***

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(for detail see A.00-11-043, p. C-24)

SCE's Residential Appliances program seeks to transform specific components of the market through a comprehensive and coordinated set of market interventions. The program is comprised of upstream and downstream marketing and financial incentives. These efforts provide consumers who are making planned or emergency replacement appliance purchases with information on the economic and environmental benefits of purchasing energy-efficient equipment. SCE's program promotes the ENERGY STAR<sup>®</sup> label, and helps consumers identify sources for ENERGY STAR<sup>®</sup> products.

### ***Program Elements:***

ELEMENT NAME	ELEMENT ACTIVITY
Residential Refrigerator Recycling	See below
Residential Appliance	See below
Residential Home Efficiency Rebate	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

### **Residential Refrigerator Recycling**

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(for detail see A.00-11-043, p. C-26)

#### ***Program Element Summary***

Early Retirement and Recycling - educates and provides direct incentives to consumers for eliminating highly inefficient refrigerators and freezers from the market place.

#### ***Activity, Accomplishments, Market Progress, & Modifications***

The program has achieved more than 39,000 MWh of net annualized energy savings and 6 MW of demand reduction. Of these amounts, the program has collected approximately 28,000 units, which represents more than 22,000 MWh of installed energy savings and 3.5 MW of demand reduction. To date, about 9% of the customers have requested the new 5-pack CFL incentive offer (in lieu of the \$35 check). During May and June, SCE conducted a marketing campaign combined for refrigerator recycling and rebates through direct mail to 50,000 customers identified with old refrigerators/freezers. As a result there was a 50% increase in scheduled units for recycling over the previous two months.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

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Authorized: \$7,500  
Revised: \$7,500

## **Residential Appliance**

(for detail see A.00-11-043, p. C-29)

### ***Program Element Summary***

The Residential Appliance program will continue to seek to transform the market for residential appliances through a comprehensive set of market interventions that are coordinated statewide. This program is designed to increase the purchase and availability of ENERGY STAR<sup>®</sup> qualified refrigerators and room air conditioners.

The overall strategy for achieving its mission is to create an active functioning market in which all market actors understand the benefits of energy-efficient appliances and consider them properly when making purchasing decisions. The program will promote ENERGY STAR<sup>®</sup> room air conditioners and refrigerators in conjunction with upcoming changes in appliance standards (July 2001) and SCE's Home Efficiency Rebate program.

Based on experience gained from 2000 program implementation and in-store promotions, SCE will rely on agencies such as community-based organizations and other outreach strategies to assist retailers with in-store promotions.

### ***Activity, Accomplishments, Market Progress, & Modifications***

- SCE has developed a request for proposal to allow manufacturers and retailers the flexibility in developing individualized in-store advertising and promotional activities tailored to their particular customer groups. It is expected that this added flexibility will provide greater promotion of ENERGY STAR<sup>®</sup> appliances.
- Edison has awarded co-op funds to five manufacturers with innovative co-op proposals ranging from adding matching manufacturer funds to provide retailer "spiffs," newspaper advertising, point of purchase displays, and buying down appliance delivery costs. Manufacturer co-op activity will commence August 2001.

### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$625  
Revised: \$250

## **Residential Home Efficiency Rebate**

### ***Program Element Summary***

With the increasing focus on providing "Californians with opportunities to control energy usage and reduce consumption" resulting in energy savings, the Home Efficiency Rebates (HER) program was redesigned for 2001. HER, modeled after the Express Efficiency Program, provides financial incentives directly to consumers who purchase and install a number of energy-efficient appliances and products.

To maximize the number of participating customers, rebates for single-family homes previously offered by the Residential Contractor Program have been transitioned to HER program. This program, a joint venture between SCE and Southern California Gas Company, makes available financial incentives for both energy-efficient gas and electric products.

Measures in HER include:

- ENERGY STAR<sup>®</sup> qualified Central Air Conditioner
- ENERGY STAR<sup>®</sup> qualified Central Heat Pump
- ENERGY STAR<sup>®</sup> qualified Gas Furnace
- Variable Speed Drive Gas Furnace
- ENERGY STAR<sup>®</sup> qualified Thermostat
- Efficient Gas Water Heater
- Attic Insulation
- Wall Insulation
- High Performance Windows
- Whole House Fan
- Evaporative Cooler
- ENERGY STAR<sup>®</sup> qualified Room Air Conditioner
- 2.0 gpm Showerhead
- Water Heater Pipe Insulation
- 2001 Federally Compliant Refrigerators and 2001 ENERGY STAR<sup>®</sup> Refrigerators

***Activity, Accomplishments, Market Progress, & Modifications***

In 2001, the HER Program has received an unprecedented number of customer response due to the following:

- New measures and program offerings
- Successful marketing campaigns
- Media focus on and promotion of programs as a solution to rising utility bills and the energy crisis

As of June 2001, an average of 2,500 HER application packages are mailed out on a daily basis to customers who have requested rebate applications, and approximately 600 applications are received each day by the Rebate Processing Center.

Refrigerators are amongst the most popular measures (nearly 7,500 rebates have been paid). Both refrigerator retailers and manufacturers have indicated to SCE that the sales of the higher-efficiency models have increased significantly in May and June of 2001 compared to sales from the previous year, and have attributed the increase to SCE's rebate program.

The 2001 Second Quarter results included over 20,000 energy efficiency measures totaling nearly \$3.4 million of incentive dollars.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,440

Revised: \$4,003

## RESIDENTIAL RETROFIT & RENOVATION

(for detail see A.00-11-043, p. C-35)

SCE's Residential Retrofit & Renovation program seeks to transform efficiency markets by simultaneously increasing market demand for energy efficiency services, strengthening service capability, and supporting introduction of new energy service products. An integrated program to address this market offers the potential of being more efficient, synergistic and effective than a combination of programs defined by end-users, technologies or intervention strategies.

### ***Program Elements:***

ELEMENT NAME	ELEMENT ACTIVITY
Residential Contractor	See below
Residential Audits	See Residential Heating & Cooling Systems Program
Mass Market Information	See Residential Heating & Cooling Systems Program
CEEREEE	See Residential Heating & Cooling Systems Program
CHEERS	See Residential Heating & Cooling Systems Program
Emerging Technologies	See Crosscutting Programs
CTAC/AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiatives	See Crosscutting Programs

### **Residential Contractor**

(for detail see A.00-11-043, p. C-37)

#### ***Program Element Summary***

The Residential Contractor Program (RCP) features two distinct elements: Single-Family (SF-RCP) and Multifamily (MF-RCP).

***Single-Family Element.*** The SF-RCP applies to single-family homes, condominium dwelling units, small-attached apartments (e.g., duplex, four-plex) and mobile homes. The element promotes heating, ventilating, and air conditioning (HVAC) services, and delivers the program through contractors approved for the program.

***Multifamily Element.*** The MF-RCP applies to apartment dwelling units, and common areas of mobile home parks, condominiums and apartment complexes. The element is designed to foster energy efficiency improvements, using a performance-based standard performance contract offering similar to the Small Business Standard Performance Contract program.

#### ***Activity, Accomplishments, Market Progress, & Modifications***

In February, SF-RCP was modified to allow the maximum number of state licensed contractors to participate in energy efficiency programs. All measures offered in the 2000 RCP Single Family element, except AC/HP Diagnostic & Tune-up, Duct Testing and Duct Sealing have transitioned to SCE's Home Efficiency Rebate program, payable to directly to customers through

that program. Screening and training requirements remain in place for HVAC contractors offering RCP diagnostics and duct sealing.

The incentive structure has been revised for RCP measures. Duct tests and duct sealing are tiered: one tier for single-family homes and one tier for mobile homes. The duct sealing incentive, increased over 2000 levels, is \$200 for single-family homes and \$150 for mobile homes. The duct test incentive is \$50 for single-family homes and \$25 for mobile homes.

The MF-RCP is currently utilizing RCP 2000 program guidelines and procedures. Application modifications to make the process easier are being considered.

2001 First Quarter Results:

- To date, single-family customer voucher reservations total more than 20,750, and multi-family customer sites total 147. This represents approximately 13,000 MWh of net annualized energy savings and 2 MW of demand reduction.

***Program Element Budget (\$000), Excluding General Support Activities:***

RCP-SF

Authorized: \$5,939

Revised: \$2,669

RCP-MF

Authorized: \$2,439

Revised: \$2,148

## Section 3: Nonresidential Program Area

Southern California Edison Company's nonresidential programs include: Small Nonresidential Comprehensive Retrofit; Large Nonresidential Comprehensive Retrofit; Nonresidential HVAC Equipment Turnover; Nonresidential Motor Turnover; Nonresidential Process; and Nonresidential Renovation & Remodeling. These programs are designed to: improve the level of retrofit energy-efficient investments in small and large commercial, industrial and agricultural end-users; transform the market for new HVAC equipment and replacement motors, increase the level of energy efficiency process overhauls; and increase the level of energy efficiency investment in the nonresidential remodel market.

### *Small Nonresidential Comprehensive Retrofit*

(for detail see A.00-11-043, p. D-5)

The Small Nonresidential Comprehensive Retrofit program is designed to increase the level of retrofit efficiency investments among small commercial, industrial, and agricultural end-users. The program's elements target distinct opportunities in the retrofit market arising from predominant end-uses among small customers.

#### *Program Elements*

ELEMENT NAME	ELEMENT ACTIVITY
Small Business Energy Survey	See below
Small/Medium Energy Management Services	See below
Small Nonresidential Mass Market Info.	See below
Agricultural/Pumping Services	See below
Express Efficiency	See below
Sm/Med Nonresidential Standard Performance Contract	See below
Small Business Pilot-Space Rental Upgrade	See below
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiative	See Crosscutting Programs

#### **Small Business Energy Survey**

(for detail see A.00-11-043, p. D-9)

#### *Program Element Summary*

The Small Commercial/Industrial Do-It-Yourself Energy Survey, available in various forms such as hardcopy, on-line, and CD ROM, and provides customers with energy efficiency information to help them reduce their energy bills. The surveys also provide an opportunity to introduce other energy efficiency products and services, such as small commercial/industrial rebates and retail outlets that feature ENERGY STAR<sup>®</sup>-rated products.

***Activities, Accomplishment, Market Progress, & Modifications***

- SCE has also implemented an on-line audit for small business customers which includes information on the 20/20 summer rebate plan.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$350

Revised: \$335

**Small/Medium Energy Management Services**

(for detail see A.00-11-043 p. D-11)

***Program Element Summary***

This program element is designed to augment other utility program elements which serve the nonresidential market by providing special services to serve the “under served” market segment which include minority and women owned businesses. This includes:

- Promoting awareness of energy efficiency and its benefits to businesses and to specific customer trade and ethnic associations and their members. Specific targeted marketing to agricultural customers and convenience stores will be included.
- Cultivate relationships between vendors and traditionally “hard-to-reach” small business market sub-segments (e.g., non-English primary language, etc.)

***Activities, Accomplishment, Market Progress, & Modifications***

- Due to increased need for energy conservation assistance the demand for individualized on-site services for small businesses has increased dramatically in 2001 in response to increased electric rates. A total of 385 visits were made to small businesses during the second quarter, for a total of 581 year to date. The year to date productivity equates to an estimated 84% of the total 2000 accomplishment. This trend is expected to continue into the third quarter.
- A total of 70 presentations to trade associations and other customer groups (ethnic, minority, and other hard to reach markets) were completed.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$350

Revised: \$350

**Small Nonresidential Mass Market Information**

(for detail see A.00-11-043 p. D-14)

***Program Element Summary***

The Energy Guide, “Smarter Business Energy Use: Saving Energy & Money”, is an energy information and education tool designed to give customers information that will empower them to better manage their business energy costs.

SCE plans to implement a two-page “Quick Tips” energy guide that will include suggestions on how customers can conserve energy usage along with references to energy efficiency programs available to them. These revised energy guides will be available in English, Spanish, Korean, Chinese, and Vietnamese. SCE will pilot the use kiosks for the distribution of the energy guides along with other delivery methods currently employed by SCE. SCE will also publish energy fact sheets on lighting, motors, HVAC, office equipment, and other energy efficiency information.

***Activities, Accomplishment, Market Progress, & Modifications***

- Completed the printing of and began distribution of the new Business Energy Guide for 2001 in English and Spanish.
- Completed the translation of the new Business Energy Guide into Chinese, Korean, and Vietnamese.
- Completed the printing of and initiated the distribution of the eight technical briefs. Translation of these briefs into Spanish, Chinese, and Korean is near completion. These technical briefs inform the customer as to the performance of selected new technologies that can save money. The customer is then walked through a set of simple calculations to help him determine the payback period for implementing the technology.
- Completed the design and have initiated the manufacture of 100 kiosks, targeting the hard-to-reach customer. These kiosks will be placed in high traffic areas targeting both residential and business customers. Interest has been shown for the placement of approximately 70 of the 100 units.
- Initiated the first “Success Story” which highlights the initiative taken by local governments to promote energy efficiency in their business communities by providing seed money for onsite energy surveys.
- Distributed a total of 48,965 copies (36,235 English, 600 Chinese, and 12,136 Spanish) of the business energy guide.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$540

Revised: \$1,413\*

\*includes Consumer Affairs Agency’s statewide media campaign.

**Agricultural/Pumping Services**

(for detail see A.00-11-043 p. D-15)

***Program Element Summary***

The Agricultural/Pumping Services program element is intended to influence water agencies, municipalities, agricultural, and other pumping customers to adopt preventative maintenance practices that should ultimately improve the overall efficiency of their pumping systems. This objective is accomplished through hydraulic test specialists who provide pump efficiency tests that determine overall plant system efficiency, electrical motor performance, pump hydraulics and water well characteristics.

**Activities, Accomplishment, Market Progress, & Modifications**

- Completed over 1,800 pumps test and/or inspections.

**Program Element Budget (\$000), Excluding General Support Activities:**

Authorized: \$2,100

Revised: \$2,100

<b>Nonresidential Express Efficiency</b>
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(for detail see A.00-11-043 p. D-18)

**Program Element Summary**

The Nonresidential Express Efficiency program educates and provides direct incentives to all nonresidential customers (i.e., small, medium, and large customers) for the elimination of specific highly inefficient electrical products from use in their businesses. Express Efficiency for 2001 includes an expanded choice of measures with the lighting, HVAC and refrigeration end-uses. During 2001, SCE may expand this measure list to capture more energy savings within these end-uses. The program uses a combination of customer representatives, vendors and contractors to delivery the program to the nonresidential customers. The program also includes rebates on LED traffic signals to cities and governmental agencies. For small business customers, SCE has added “blitz” initiative that focus on delivering specific measures (e.g., window film) to targeted small business segments and climate zones.

**Activities, Accomplishment, Market Progress, & Modifications**

- SCE’s Express Efficiency program for small-medium customers is fully committed representing approximately 45,000 MWh of net annualized energy savings and 6.5 MW of demand reduction. The “blitz” program officially ended July 1, 2001. The reflective window film component of the blitz program was well received by customers in SCE’s eastern desert regions. SCE has also implemented an on-line audit for small business customers which includes information on the 20/20 summer rebate plan.
- SCE’s Express Efficiency program for large customers is fully committed representing approximately 108,000 MWh of net annualized energy savings and 27 MW of demand reduction.
- The 2001 LED Traffic Signal Rebate program is fully committed with 42 cities enrolled representing approximately 34,000 MWh of net annualized energy savings and 7.7 MW of demand reduction. Between SCE’s 2001 Express and 2000 Summer Initiative offerings, 77 cities have committed to installing energy efficient LED traffic signals during 2001 with an anticipated total of 69,000 MWh of annualized energy savings and 15 MW of demand reductions.

**Program Element Budget (\$000), Excluding General Support Activities:**

**Small/Medium Express (including – LED Traffic Signals activities)**

Authorized: \$6,433

Revised: \$6,871

Large Express

Authorized: \$0

Revised: \$6,312

<b>Small/Medium Nonresidential Standard Performance Contract Program</b>
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(for detail see A.00-11-043 p. D-8)

***Program Element Summary***

The Small Business Standard Performance Contract (SBSPC) program is a performance-based retrofit program that offers financial incentives for energy efficiency measures that deliver verified energy savings at small and medium (under 500 kW demand or 250,000 annual therm usage) commercial, industrial and agricultural customer facilities. Financial incentive rates, performance measurement protocols, payment terms, and all other operating rules of the program are specified in the program procedure manual or on the utilities websites.

In response to the need to achieve immediate energy savings during 2001, SCE has incorporated the planned Small Business Pilot – Space Rental Update offering into the already existing 2001 SBSPC. To this end, SBSPC will promote the implementation of weatherization measures in the market of strip malls and commercial tenants.

***Activities, Accomplishment, Market Progress, & Modifications***

The program has achieved approximately 6,800 MWh of net annualized energy savings and 1.3 MW of demand reduction. When the total dollar value of all applications received reaches 110% of the authorized budget, additional applications will be placed on a wait list in the event that additional funding is authorized by the CPUC. We anticipate that the current funding allocation will be subscribed by July 31, 2001.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$0\*

Revised: \$1,980

\*SCE had originally proposed in its 2001 program application to the CPUC combining Small and Large SPC into one SPC program offering.

## ***Large Nonresidential Comprehensive Retrofit***

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(for detail see A.00-11-043 p. D-20)

The Large Nonresidential Comprehensive Efficiency Retrofit program is designed to increase the level of retrofit efficiency investments involving large commercial, industrial, and agricultural end-users. An integrated approach combining early replacement and supplemental measures across related end-uses will maximize benefits and minimize costs. The program's elements target distinct opportunities in the retrofit market arising from predominant commercial, industrial, and agricultural end-uses: HVAC, lighting, motor-drive systems, and process applications. The program includes an array of intervention strategies at critical points in the decision-making process for retrofit efficiency transactions.

### ***Program Elements***

ELEMENT NAME	ELEMENT ACTIVITY
Large Nonresidential Standard Performance Contract	See below
Commercial Energy Efficiency Info. Svcs.	See below
Industrial Energy Efficiency Info. Svcs.	See below
Express Efficiency	See Small Nonres. Comp. Retrofit
Agricultural/Pumping Services	See Small Nonres. Comp. Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

### **Large Standard Performance Contract**

(for detail see A.00-11-043 p. D-24)

#### ***Program Element Summary***

The Large Nonresidential Standard Performance Contracting (LNSPC) program is a statewide performance-based retrofit program that offers incentives for energy efficiency measures that deliver verified energy savings at commercial, industrial, and agricultural customers facilities. The program is a "standard offer" consisting of payment of a fixed-price incentive by the utility administrator to end users or third-party EESPs in exchange for measured kilowatt-hour (kWh) energy savings achieved by the installation of an energy efficiency project at a host customer facility.

#### ***Activities, Accomplishment, Market Progress, & Modifications***

The program is fully subscribed and as result has achieved over 26,000 MWh of net annualized energy savings and 6 MW of demand reduction. The dollar value of all applications we have received exceeds our available funding of \$4 million by about 80%, or \$3.3 million. Without the certainty of additional funding for the SPC program, we plan to place about \$2.3 million of applications on a wait list pending further direction or an additional funding authorization by the CPUC.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$15,750  
Revised: \$5,027

### **Commercial Energy Efficiency Information Services**

(for detail see A.00-11-043 p. D-25)

#### ***Program Element Summary***

The Commercial Energy Efficiency Information Services (Commercial EEIS) program element is designed to produce a permanent change in how commercial customers make decisions about equipment purchases and operational practices. This is accomplished by educating them through direct contact where discussions center on evaluating energy choices. For 2001, SCE has implemented a “Beat the Peak” offering that encourages customers to reduce peak load reduction. A certificate is presented to those customers who promise to reduce peak energy usage during 2001.

#### ***Activities, Accomplishment, Market Progress, & Modifications***

- Nearly 1,600 commercial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$350  
Revised: \$575

### **Industrial Energy Efficiency Information Services**

(for detail see A.00-11-043 p. D-27)

#### ***Program Element Summary***

The Industrial Energy Efficiency Information Services (Industrial EEIS) program element is designed to produce a permanent change in how industrial customers make decisions about equipment purchases and operational practices. This program element seeks to alter the industrial customers’ mindset and elevate the importance of educating customers on how to make more informed energy choices. For 2001, SCE has implemented a “Beat the Peak” offering that encourages customers to reduce peak load reduction. A certificate is presented to those customers who promise to reduce peak energy usage during 2001.

#### ***Activities, Accomplishment, Market Progress, & Modifications***

- Nearly 800 commercial customers were contacted to promote energy efficiency programs such as SPC and Express Efficiency.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$350  
Revised: \$575

## ***Nonresidential HVAC Equipment Turnover***

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(for detail see A.00-11-043 p. D-31)

The Nonresidential HVAC Turnover program seeks to transform the market for new heating, ventilation, and air-conditioning equipment. As existing equipment nears or reaches the end of its useful life, the program attempts to influence the decision-making process used by buyers and sellers of equipment purchased and installed through the normal replacement cycle. The program seeks to raise the efficiency level of equipment specified and selected by engineers, vendors, and contractors for end-users. Also, the program will attempt to stimulate market adoption of high-efficiency controls, optimal equipment sizing, and high-efficiency operation, and maintenance practices.

### ***Program Elements***

<b>ELEMENT NAME</b>	<b>ELEMENT ACTIVITY</b>
Nonresidential Upstream HVAC Pilot	See below
HVAC Commissioning Pilot Program	See below
Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Industrial Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Com'l. Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Express Efficiency	See Small Nonres. Comp. Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third Party Initiative	See Crosscutting Programs

### **Nonresidential Upstream HVAC Pilot**

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(for detail see A.00-11-043 p. D-34)

#### ***Program Element Summary***

The Nonresidential Upstream HVAC Pilot (Upstream HVAC) seeks to transform the market for nonresidential central air conditioners (a/c) and central heat pump units through an upstream financial incentive strategy for HVAC installation contractors. At the point of the equipment replacement market event, the program focuses on creating a “market pull” condition to increase penetration rates of a/c units at least one EER above Title 24 building codes, installed at small and medium nonresidential customer locations. The term “small and medium” is defined as under 500 kW demand.

The program element has two main areas of focus: (1) utilization, for the program’s advantage, of the historic business practices employed in the commercial HVAC equipment distribution channel; and (2) HVAC contractor-directed and assisted customer selection of high efficiency and premium efficiency central air conditioning units over standard efficiency units in emergency replacement and planned replacement opportunities.

For 2001, the program offers air conditioning contractors a “Quick Start Bonus” to assist in the promotion of energy efficient central a/c and heat pumps at the time of purchase. The customer

rebates are channeled through the Express Efficiency Program. This shifting of the customer rebate from the Nonresidential Upstream HVAC Program is a strategic modification that took place this year.

***Activities, Accomplishment, Market Progress, & Modifications***

- The Quick Start Bonus promotion was completed the end of June. Contractors sent in 73 applications.
- A follow-up promotion called the Summer Cool-off is planned for implementation in August to increase participation.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$250

Revised: \$70\*

\* - incentives offered through Express Efficiency.

## ***Nonresidential Motor Turnover***

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(for detail see A.00-11-043 p. D-39)

The Motor Turnover program targets intervention strategies at manufacturers, distributors, vendors, and end-users to stimulate demand and supply for premium-efficiency motors, pumps, and fans, high-efficiency motor controls, and optimal motor sizing and application. While all nonresidential end-users are eligible, the primary end-user segments are industrial and agricultural.

### ***Program Elements***

<b>Element Name</b>	<b>Element activity</b>
Nonresidential Upstream Motors Pilot	See below
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Comm'l. Energy Efficiency Info. Svcs.	See Large Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. HVAC Equip. Turnover
Agricultural/Pumping Services	See Large Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

### **Nonresidential Upstream Motors Pilot**

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(for detail see A.00-11-043 p. D-41)

#### ***Program Element Summary***

The Nonresidential Upstream Motor Pilot program element (Upstream Motors) seeks to transform the market for premium efficiency three phase electric motors. This program element seeks to sustain long-term market effects by both adapting to, and changing certain industry practices and attitudes pertaining to the distributors' method of motor acquisition, stocking, ready availability and final sale of premium efficiency electric motors through traditional motor distribution channels. Upstream Motors will be accomplished through an upstream financial incentive strategy for non-OEM motor distribution channel members to encourage stocking of qualifying motors.

#### ***Activities, Accomplishment, Market Progress, & Modifications***

- Influenced 23 motor dealers to exceed SCE instituted sales quotas for 2001.
- Processed the sale of 749 motors to SCE nonresidential customers.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$550

Revised: \$330

## ***Nonresidential Process***

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(for detail see A.00-11-043 p. D-48)

This program is designed to increase the level of energy-efficient process overhauls on the part of commercial, industrial, and agricultural users. While the technical opportunities and constraints are distinct among commercial, industrial, and agricultural processes, the intervention strategies targeting barriers to energy-efficient choices are similar in all three elements.

### ***Program Elements***

<b>ELEMENT NAME</b>	<b>ELEMENT ACTIVITY</b>
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. HVAC Equip. Turnover
Agricultural/Pumping Services	See Small Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

## ***Nonresidential Renovation & Remodeling***

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(for detail see A.00-11-043 p. D-53)

The Commercial Remodeling/Renovation program seeks to increase the level of investment in energy efficiency equipment and strategies in existing buildings during nonresidential remodels and renovations. A mix of intervention strategies, each appropriate to specific circumstances, will provide energy efficiency opportunities to all customer classes pursuing facility renovation, remodel, alteration, rehabilitation, modernization, broad-scope and first time tenant improvement, and tenant change, etc. Because the preceding phrases have specific meaning to some stakeholders but are used interchangeably by others, this interpretation proposes that the broadest range of facility upgrade activities are understood to be included in this program area.

### ***Program Elements***

<b>ELEMENT NAME</b>	<b>ELEMENT ACTIVITY</b>
Savings By Design	See below
Express Efficiency	See Small Nonres. Comprehensive Retrofit
Large Standard Performance Contracting	See Large Nonres. Comprehensive Retrofit
Comm. Energy Efficiency Info. Svcs.	See Small Nonres. Comprehensive Retrofit
Ind. Energy Efficiency Info. Svcs	See Large Nonres. Comprehensive Retrofit
Emerging Technologies	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs

### **Savings By Design**

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(for detail see A.00-11-043 p. D-55)

### ***Program Element Summary***

Savings By Design is a program offering that promotes high performance nonresidential building remodeling and renovation. The program element encourages the reconstruction of energy-efficient buildings and the process seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. Savings By Design will improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design. The program provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in building remodeling and renovation.

### ***Activities, Accomplishment, Market Progress, & Modifications***

Minor modifications to the program were made to allow for more effective delivery of the incentive program and to coordinate with upcoming Title 24 changes per AB 970:

- Incentive caps were lowered to increase the total number of participants
- Incentive rates were adjusted to more closely reflect the incremental costs associated with different end-uses and systems

- HVAC equipment thresholds were raised to introduce to the market the new efficiency levels that will be required by the new Standards

As of June 3, 2001, the renovation and remodeling component of Savings By Design had achieved 10,800 MWh of net annualized energy savings and 2 MW of demand reduction.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,700

Revised: \$1,150

*See Statewide Programs for further discussion of other activities completed for the Savings By Design program.*

## Section 4: New Construction Programs

New construction programs are developed to increase the energy efficiency of building design, as well as the efficiency of the technologies buildings employ. Prior to construction equipment efficiency for lighting, heating, ventilation, and air-conditioning can be upgraded, with supplemental equipment (primarily controls) or materials (e.g., insulation). Many of these energy efficiency measures become too expensive to install once a structure has been completed. As a result, many of SCE's efforts are directed toward modifying customer behavior during the concept and design phases of construction.

### *Residential New Construction*

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(for detail see A.00-11-043 p. E-4)

SCE's Residential New Construction program will seek to transform the residential new construction market to one in which consumers demand and the market delivers homes which are more energy-efficient than required by current code (Title 24). The program will aim to increase awareness among key market actors – including builders, consumers, lenders and third party builder allies (architects, energy consultants, subcontractors, Title 24 Consultants, and CHEERS raters). The integrated approach to this market will include increased awareness through targeted information on the financial value of efficient, quality construction, enhancement of skills through education and training, and the creation of a competitive market for efficient new homes. Implementation of these elements under the umbrella of a single program will ensure that appropriate linkages are made between efforts to influence different, but related market actors and overcome different, but related market barriers. This integration also offers the potential for greater efficiency, synergism, and flexibility in program implementation.

### *Program Elements*

ELEMENT NAME	ELEMENT ACTIVITY
SCE-sponsored ComfortWise <sup>sm</sup>	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

### **Residential New Construction**

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(for detail see A.00-11-043 p. E-7)

### *Program Element Summary*

This program has a variety of offerings ranging from incentives to education and information. Starting in 2001, SCE will offer financial incentives to manufacturers to buy-down the cost of high efficiency central air conditioners (e.g., SEER 14, 11.6 EER), as well as offering "Fast Track" incentives to the air conditioning contractors for installations occurring by July 31, 2001. SCE will also continue the ComfortWise/EnergyStar Homes residential new construction

program that provides builder incentives for properly sized air conditioning units, resulting from better mechanical design and installation practices; high efficiency windows; inspections and diagnostics.

***Activities, Accomplishment, Market Progress, & Modifications***

The Residential New Construction program has committed 956 units to the ComfortWise (a whole house approach) program strategy. Of these units, SCE expects approximately 150 - 200 units to be built this year. SCE expects to enroll 4,000 units by December 2001. The manufacturer buy-down program for high efficiency air conditioning is rapidly gaining momentum. This program was created to both complement other program strategies as well as capture energy savings and demand reduction from those homes that have progressed in the construction phase. To date, SCE has received reservations for 982 units. Based on the feedback thus far from the participating manufacturers, funds are expected to be fully subscribed by third quarter of 2001. Additionally, SCE has been actively promoting and educating the building industry on the changes to the energy efficiency standards (Title 24), effective June 1, 2001, by offering training seminars. The training explains how the affects of Title 24 standards will impact builders, and how participating in SCE's residential new construction program not only assists builders in meeting the new standard, but exceed the code as well.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$3,750

Revised: \$3,100

## ***Commercial New Construction***

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(for detail see A.00-11-043 p. E-12)

The Commercial New Construction (CNC) program is designed to transform energy efficiency investment behavior in non-industrial, non-agricultural and nonresidential construction markets. The objective of the CNC program is to increase the energy efficiency of building design, as well as the efficiency of the technologies buildings employ. By integrating interactions between multiple end-uses and efficiency technologies, comprehensive design saves large amounts of energy and capital while improving comfort and productivity. The program's elements target distinct links in the new construction decision-making chain, reflecting differences in design activities and priorities between large and small buildings. All elements target all end-uses in commercial buildings, particularly the predominant end-uses of lighting and HVAC. Intervention strategies mix design tools and information, technical assistance, and training with financial incentives to increase supply of and demand for high-efficiency building design, equipment, and materials. Base funding for energy centers focusing on new nonresidential construction is also included in this program.

### ***Program Elements***

<b>ELEMENT NAME</b>	<b>ELEMENT ACTIVITY</b>
Savings By Design	See below
Energy Design Resources	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

### **Savings By Design**

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(for detail see A.00-11-043 p. E-16)

#### ***Program Element Summary***

**Savings By Design (SBD)** – SBD is a statewide program element that promotes high performance nonresidential building design and construction. The program element encourages the construction and operation of energy-efficient buildings and the process seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. SBD will improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design, including a focus on system performance assurance. The program element provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in new building design and construction.

SBD assures the construction and operation of energy-efficient buildings by intervening to make building designs more energy-efficient, improve the efficiency of the technologies that buildings employ, provide mechanisms to evaluate program success, and permanently engender these practices in the marketplace. The SBD program element targets specific links in the construction

decision-making chain, reflecting differences in design activities and priorities between large and small buildings and various occupancies.

***Activities, Accomplishment, Market Progress, & Modifications***

Modifications to the program were made to allow for more effective delivery of the incentive program and to coordinate with upcoming Title 24 changes per AB970:

- Incentive caps were lowered to increase the total number of participants
- Incentive rates were adjusted to more closely reflect the incremental costs associated with different end-uses and systems
- HVAC equipment thresholds were raised to introduce to the market the new efficiency levels that will be required by the new Standards

Savings by Design program continues to attract projects and as a result has achieved approximately 13,000 MWh of net annualized energy savings and 2 MW of demand reduction. In addition, our outreach in the refrigeration industry has led to approximately 30 potential projects with new refrigeration facilities. Also, as part of the SBD program, information on the CheckPoint Rebate Program is currently available through five city building departments and discussions are in progress with at least five more cities. The program has been implemented using SCE service planners who make information and applications available to customers involved in new nonresidential construction sites.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$5,000

Revised: \$7,850

*See Statewide Programs for further discussion of other activities completed for the Savings By Design program.*

<b>Energy Design Resources</b>
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(for detail see A.00-11-043, p. E-18)

***Program Element Summary***

Energy Design Resources is an integrated package of design tools and information resources that promotes the design and construction of high-performance buildings. These tools are readily available and accessible to designers working in the new construction market and inherently complement the whole building approach strategies of the Savings By Design program. The program provides information resources, software tools, technology transfer, and validation of and peer recognition for designers and developers of exemplary projects that successfully incorporate principles of energy-efficient design, initiate and pilot projects, process and procedural models, and industry and academic partnerships.

***Element Activities, Accomplishment, Market Progress, & Modifications***

Development of new Energy Design Resources materials was minimized in 2001 in order to focus available resources on securing energy reductions, however, promotion of the existing tools in the new construction market has continued.

On-site luncheon seminars were provided as shown in the table below:

February 7	Loring Cruz Design & Consulting	Daylighting
February 8	Richard Meier & Partners	Daylighting
February 8	HOK, Santa Monica	Integrated Design
February 15	Dougherty & Dougherty	Integrated Design
March 28	Anshen & Allen Architects	Daylighting
March 29	Steven Ehrlich Architects	Daylighting
May 2	Coleman & Caskey	Integrated Energy Design
May 3	Dougherty & Dougherty	Energy Efficient Electric Lighting
May 4	Zimmer, Gungel & Frasca	Daylighting
May 31	Perkins and will	Daylighting
June 1	Kajima Associates	Integrated Energy Design

- Final packaging of materials developed in 2000 was continued, with completion of a second volume of design briefs and new electronic tools available in the second quarter.
- Support of the Advanced Lighting Guidelines. There have been approximately 15,000 downloads of the document since its release on June 5, 2001.
- On-going maintenance of the Energy Design Resources website.

The following table shows number of website visits:

January	3753
February	4100
March	4755
April	5378
May	5215
June	5420

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,200  
Revised: \$100

## ***Industrial/Agricultural New Construction***

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(for detail see A.00-11-043, p. E-19)

The Industrial and Agricultural New Construction (IANC) program is designed to transform energy efficiency investment behavior for process loads in new construction and facility expansion projects. The objective of the IANC program is to optimize the energy efficiency of new and expanded industrial and agricultural process, as well as the facilities where processes are housed. Two separate program elements target process- and facility-related efficiency opportunities and decisions. While the technical opportunities and constraints are distinct, the intervention strategies targeting barriers to energy-efficient choices are similar in both elements. Each element combines specialized technical assistance, integrated design assistance and incentives, and customized financial strategies.

### ***Program Elements***

<b>ELEMENT DESCRIPTION</b>	<b>ELEMENT ACTIVITY</b>
Savings By Design	See below
Emerging Technologies Showcasing	See Crosscutting Programs
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

### **Savings By Design**

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(for detail see A.00-11-043, p. E-20)

#### ***Program Element Summary***

SBD is a statewide program element that promotes high performance industrial and agricultural facility design and construction. The program element encourages the construction of energy-efficient manufacturing facilities and processes, and seeks to permanently reduce the transaction costs associated with developing and evaluating energy-efficient design alternatives. SBD will improve the comfort, efficiency, and performance of industrial and agricultural facilities by promoting an integrated team approach to design. The program element provides direct benefits to all market actors and market segments, including building owners – large or small, public or private, occupant or developer – and design professionals involved in new facility and process design and implementation.

#### ***Element Activities, Accomplishment, Market Progress, & Modifications***

The following modification(s) to the program was made to allow for more effective delivery of the incentive program:

- Incentive caps were lowered to increase the total number of participants

Program results are summarized under the Commercial New Construction program under the SBD program element.

**Program Element Budget (\$000), Excluding General Support Activities:**  
See Savings By Design - Commercial

**Codes & Standards Support and Local Government Initiatives**

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(for detail see A.00-11-043, p. E-22)

This integrated program seeks to support the development and implementation codes and standards, with an emphasis on peak electric demand reduction, across both new construction and remodel/renovation markets to the extent that both new construction and major tenant improvements involve the same market participants and are subject to California’s “Energy Efficiency Standards for Residential and Nonresidential buildings,” also known as Title 24 Energy Standards. The program also addresses standards-setting organizations such as the American Society of Heating, Refrigeration and Air-Conditioning Engineers, code-setting bodies such as the California Energy Commission and the Department of Energy, and enforcement authorities such as city and county building departments.

**Program Elements:**

<b>ELEMENT DESCRIPTION</b>	<b>ELEMENT ACTIVITY</b>
New Construction Codes & Standards	See below
Local Government Initiative	See below
CTAC / AGTAC Energy Centers	See Crosscutting Programs
Third-Party Initiatives	See Crosscutting Programs

**New Construction Codes & Standards**

(for detail see A.00-11-043, p. E-24)

**Program Element Summary**

The Codes and Standards program element proposes to bring about upgrades in energy efficiency standards and codes, thereby capturing the benefits for society from California’s diverse energy efficiency efforts. Codes and Standards Enhancement studies for energy efficiency improvements will be developed for promising design practices and technologies (such as those developed in the Residential and Nonresidential New Construction programs) and will be presented to standards code setting bodies in a coordinated manner.

**Element Activities, Accomplishment, Market Progress, & Modifications**

- SCE and other interested stakeholders participated in a meeting to discuss potential enhancements to the EPA’s Energy Star HVAC equipment specification based on the current statewide residential rebate program guidelines.
- SCE developed a Codes and Standards Enhancement (CASE) initiative work scope for high ambient testing of HVAC equipment. Testing is to be completed at SCE’s Refrigeration &

Thermal Test Center located in Irwindale. The final report is scheduled for completion by spring of 2002.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$1,670

Revised: \$700

<b>Local Government Initiative</b>
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(for detail see A.00-11-043, p. E-25)

***Program Element Summary***

This element will support local government initiatives to transform energy efficiency markets at the community level. Some local governments may use the municipal planning process and the development approval process to institutionalize wider consideration and implementation of energy efficiency in community planning and new construction. Other local governments may establish institutions or programs to mobilize and link community resources to form self-sustaining partnerships, mechanisms and/or initiatives that promote and facilitate energy efficacy on a community-wide basis. These community-based initiatives can also mobilize and link a broad range of community resources (local financial institutions, contractors, business organizations, service clubs, and non-profits) to form self-sustaining partnerships, mechanisms and /or initiatives to promote and facilitate energy efficiency.

***Activities, Accomplishment, Market Progress, & Modifications***

The Local Government Commission has implemented a Thermostatic Expansion Valve incentive program targeted at HVAC distributors and installers. This program is similar to a strategy offered as part of SCE's Residential New Construction program. Additionally, LGC continues to work with local jurisdictions on energy provisions and policies (street width, tree canopies, building orientation) that can be incorporated at the General Plan stage of development.

***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$400

Revised: \$385\*

\* - does not include any initiatives with individual cities.

## Section 5: Statewide And Crosscutting Programs

### Statewide Program Activity

#### Residential

##### Statewide Residential Energy Guide

- a. Description of program and program element/strategy*
- Pacific Gas and Electric Company, Southern California Edison, and San Diego Gas & Electric Company continue to distribute existing English, Spanish and Chinese Statewide Energy Guides to residential customers through a variety of delivery channels. The Residential Energy Guide provides statewide consistency on energy efficiency information and awareness of appliance practices and resources to each utility's residential customers.
- b. Market participants and/or end uses*
- Participants: The target market for the Statewide Residential Energy Guide is residential customers.
  - End Uses: All residential end uses are targeted.
- c. Accomplishments/milestones/market effects observed to date*
- During the first quarter of 2001, utility focus was on distributing existing back-stock of the Energy Guide. In addition, efforts are underway to revise and distribute utility specific "Quick Tips" energy guides.
  - During second quarter, each utility distributed utility-specific quick tip energy guides for residential customers. The total number of energy guides distributed by each utility is being reported on an individual basis.

##### Statewide Residential Lighting Program

- a. Description of program and program element/strategy*
- Pacific Gas and Electric Company, Southern California Edison, and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Lighting program.
  - In PY2001, lighting program strategies included manufacturer incentives, education and outreach to retailers and manufacturers, field services, salesperson training, paid advertising, and other consumer outreach and promotional activities.
- b. Market participants and/or end uses*
- Participants: Residential Customers
  - End Uses: ENERGY STAR<sup>®</sup> qualified lighting products

*c. Accomplishments/milestones/market effects observed to date*

- Year to date, three co-op projects have been approved with three manufacturers promoting ENERGY STAR<sup>®</sup> qualified torchieres and compact fluorescent light bulbs to multiple retailers. Participating manufacturers include Lights of America, GE Lighting and Feit Electric. No additional co-op projects are anticipated this year.

<b>Statewide Residential Appliance Program</b>
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*a. Description of program and program element/strategy*

- Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company and San Diego Gas & Electric continue to coordinate efforts under the Statewide Residential Appliance program.

*b. Market participants and/or end uses*

- Participants: Residential customers
- End Uses: ENERGY STAR<sup>®</sup> qualified appliances

*c. Accomplishments/milestones/market effects observed to date*

- Each utility currently operates and administers coordinated cooperative promotional incentives to retailers and manufacturers (co-op programs)

<b>Residential Energy Efficiency Contractor program (RCP)</b>
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*a. Description of program and program element/strategy*

- The 2000 Residential Contractor Program was originally designed to promote a self-sustaining contractor market for energy efficiency services in the residential retrofit, renovation, and remodeling market. Recent changes in the energy market have caused the program to shift some efforts from upstream to downstream in order to address a changing energy market.
- The program has two distinct elements: the Multifamily and Single Family Elements: Multifamily Element applies to:
  - apartment dwelling units
  - common areas of apartments and condominium complexes, and
  - common areas of mobile home parks.
- The Single Family Element applies to:
  - single family homes
  - condominium dwelling units,
  - small attached apartments with up to four dwelling units (e.g., duplexes, triplexes, and fourplexes), and
  - mobile homes

*b. Market participants and/or end uses*

- Participants: Residential customers

- End Uses: Various residential applications

*c. Accomplishments/milestones/market effects observed to date*

- During the second quarter of PY 2001, Pacific Gas & Electric, Southern California Edison, Southern California Gas, SMUD, LADWP and San Diego Gas & Electric reached agreement on three tiers for high efficiency central air conditioner and heat pump specifications for PY 2002 rebate programs. The desire is to use ENERGY STAR® as the base level, while the California utilities support a 13 SEER, 11 EER with TXV. The utilities are also discussing rebate amounts for air conditioning equipment to maintain as much consistency as possible in rebate levels on a statewide basis.
- Representatives from each of the major utilities attended the recent National HVAC Meeting hosted by the Environmental Protection Agency (EPA) to communicate the California utilities' recommendations for ENERGY STAR® specifications for 2002. At the meeting, a presentation mutually developed and agreed upon by all the utilities was presented to the EPA and manufacturers in attendance. A number of states were represented at this meeting and it is hoped that this will lead to more national similarity of programs. The utilities are continuing to hold conference calls to discuss future actions in anticipation of EPA's specifications for 2002.
- The utilities are also discussing rebate approaches for all energy efficiency measures pertaining to residential, commercial and new construction. Through these ongoing discussions, preliminary rebate ranges have been agreed upon for residential energy efficiency measures such as windows, attic and wall insulation, whole house fans and water heaters.

## Nonresidential

### Large Nonresidential Standard Performance Contract (LNSPC) Program

#### *a. Description*

- Performance based program that offers incentives (posted price) to customers or Energy Efficiency Service Providers (EESPs) for installation of energy efficient equipment at customer facilities.
- The program targets large nonresidential customers.
- LNSPC is standardized statewide. This includes incentive levels, procedures, and contracts, with some program differences to reflect different service territory needs.
- Incentive levels are based on measure end use and the type of energy savings verification plan.
- Utility promotes and administers the program with EESPs and utility account services representatives promoting energy efficient projects to customers.

#### *b. Market participants and/or end uses*

- Participants: Large commercial, industrial and agricultural customers (greater than 500 kW or 250,000 annual therms), Energy Efficient Service Providers (EESP), contractors, and engineering firms.
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type specific end uses.

#### *c. Accomplishments/milestones/market effects observed to date*

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables and engineering calculations are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.00 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 5.5¢ per kWh, HVAC and refrigeration measures – 18.0¢ per kWh, and other measures (e.g., motors, variable speed drives) - 9.0¢ per kWh. The incentive for summer on-peak kW savings is \$100 for lighting measures, \$225 for HVAC measures and \$150 for other measures.
- The MSO incentive for natural gas measures is \$1.10 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 6.0¢ per kWh, HVAC and refrigeration measures – 20.0¢ per kWh, and other measures (motors, variable speed drives) - 10.0¢ per kWh. The incentives for summer on-peak kW savings are the same as the CSO incentive.
- PG&E and SCE committed their LNSPC funds in the second quarter. SDG&E expect to commit their LNSPC funds in July. New projects are being placed on a wait list should additional funding become available.

## Small Business Standard Performance Contract (SBSPC) Program

### *a. Description:*

- Similar to Large Nonresidential Standard Performance Contract (LNSPC) Program.
- The program targets small and medium nonresidential customers.
- SBSPC is standardized statewide. This includes incentive levels, procedures, and contracts, with some program differences to reflect different service territory needs.
- A customer may self-sponsor an SBSPC project in 2001.
- Incentive levels are based on measure end use and the energy savings verification plan.

### *b. Market participants and/or end uses*

- Participants: Small and medium commercial, industrial, and agricultural customers with electric demand equal to or less than 500 kW or 250,000 annual therms.
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

### *c. Accomplishments/milestones/market effects observed to date*

- In 2001, there are two payment levels based on end use and verification plan. The Calculated Savings Option (CSO) eliminates field measurement (reference tables are used). The Measured Savings Option (MSO) offers a higher incentive because field measurement is required to verify achieved energy savings.
- The CSO incentive for natural gas measures is \$1.10 per annual therm of savings. The CSO incentive for electric measures are as follows: lighting measures – 6.0¢ per kWh, HVAC and refrigeration measures – 20.0¢ per kWh, and other measures (e.g., motors, variable speed drives) - 10.0¢ per kWh. The incentive for summer on-peak kW savings is \$125 for lighting measures, \$250 for HVAC measures and \$175 for other measures.
- The MSO incentive for natural gas measures is \$1.20 per annual therm of savings. The MSO incentive for electric measures are as follows: lighting measures – 7.0¢ per kWh, HVAC and refrigeration measures – 22.5¢ per kWh, and other measures (motors, variable speed drives) - 11.0¢ per kWh. The incentives for summer on-peak kW savings are the same as the CSO incentive.
- PG&E and SDG&E committed their SBSPC funds in the second quarter. New projects are being placed on a wait list should additional funding become available. Funding is still available under SCE's Small Business SPC program offering.

## Express Efficiency Program

### *a. Description:*

- Provides standard rebates to customers, contractors, and EESPs for installation of energy efficient equipment.
- The program targets small and medium nonresidential customers.
- Statewide program, with differences to reflect different service territory needs.
- Incentive cap of \$25,000 per account and \$2 million per corporate parent statewide.

**b. *Market participants and/or end uses***

- Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 kW or 250,000 annual therm).
- End Uses: Heating, ventilation, air-conditioning, refrigeration, lighting, water heating, and other building-type-specific end uses including agricultural.

**c. *Accomplishments/milestones/market effects observed to date***

- In 2001, several new measures were added to the program. These measures (refrigeration, agricultural and additional gas measures) will help with the outreach to specific end use customers.
- New technologies will be evaluated and possibly demonstrated, and where appropriate, added to the Express Efficiency program.
- This program still has funds available and could commit all funds before year-end.

<b>Statewide Business Energy Guide</b>
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**a. *Description:***

- Statewide energy guide provides energy information and education to customers to better manage their business energy costs.
- Provides energy information for office buildings, grocery stores, restaurants, retail outlets and manufacturing facilities.
- Brochure currently available in English, Spanish and Chinese.
- Target markets includes commercial businesses, business trade/vendor shows, Small Business Associations, Chambers of Commerce, building permits and government offices and business on-site surveys conducted by utility representatives.

**b. *Market participants and/or end uses***

- Participants: Small and medium commercial, industrial, and agricultural customers (equal to or less than 500 kW).
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

**c. *Accomplishments/milestones/market effects observed to date***

- The utilities continue to distribute the Business Energy Guide to small nonresidential customers.

<b>Emerging Technologies</b>
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**a. *Description:***

- Emerging Technologies activities focus on demonstrating energy efficiency options not widely adopted by various market actors.
- Program makes detailed designs of efficiency options and their performance information widely available.
- The Emerging Technologies Coordinating Council (ETTC) was established to seek opportunities to coordinate efforts between each of the utilities emerging technologies programs as well as the CEC's PIER program.

**b. Market participants and/or end uses**

- Participants: All customers
- End Uses: Heating, ventilation, air-conditioning, lighting, water heating, and other building-type-specific end uses.

**c. Accomplishments/milestones/market effects observed to date**

- The utilities and the CEC continue discussions on emerging technologies through the Emerging Technologies Coordinating Council. On June 21<sup>st</sup>, the utilities participated in a conference call to discuss the status of emerging technologies. This was the third meeting of the utilities and the CEC in 2001 to discuss emerging technologies this year.
- The utilities continue to work with individual customers to develop showcase emerging technologies projects in their service territories.

<b>Energy Centers</b>
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**a. Description**

- Three of the state's investor owned utilities, PG&E, SCE, and SCG operate Energy Centers. Unified by the common goal of educating their customers about energy-efficient business solutions, the utilities' jointly developed plans to increase cooperation among the utility energy centers. This plan addressed three potential areas for working together collaboratively to build on a statewide program. These are: (A) seminar/program coordination; (B) a web based energy efficiency library; and (C) a partnership program with independent third parties and/or state agencies.
- Energy Centers use training, outreach, education, and tool development to support delivery of statewide programs. Energy Centers are uniquely suited to address peak demand reduction and promote energy savings directly by offering programs designed specifically for that purpose.

**b. Market participants and/or end uses**

- Participants: All customers
- End Uses: All end uses

**c. Accomplishments/milestones/market effects observed to date**

- **Seminar/Program Coordination**: The utilities continue to coordinate seminars as appropriate. The centers recognize that, through regional collaboration, the opportunity

exists to develop a more comprehensive set of energy efficiency conferences/seminars that would reflect the expertise and experience from a diverse group of contributors statewide.

- **Web-Based Energy Efficiency Library:** The Energy Centers see this as a centralized and comprehensive online information library that could serve as an electronic information hub on all aspects of energy efficiency. Through a collaborative effort, an independent contractor was hired to construct a site named “energyefficiencycenter.com.” The site, which was implemented on April 17, 2000, provides users with links to the energy centers as well as links to a number of associations, organizations, and government agencies where information on energy efficiency can be found. The links are categorized to assist the users, and a search engine (which will be further enhanced) will also help guide users to the information they seek.
- **Partnership Program with Third Parties and/or State Agencies:** The Energy Centers will also further investigate how partnerships can be utilized to enhance the web site and its content. This effort is still under development.

## New Construction

<b>Savings By Design (SBD)</b>
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**a. Description of program and program element/strategy**

- A statewide program implemented by PG&E, SCE, SCG, and SDG&E that encourages high performance commercial building design and construction.
- Seeks to permanently reduce the transaction costs associated with developing and evaluating energy efficient design alternatives.
- Seeks to improve the comfort, efficiency, and performance of buildings by promoting an integrated team approach to design.
- The Nonresidential Retrofit and Renovation program is also covered under the SBD program although implementation may differ by utility.

**b. Market participants and/or end uses**

- Participants: Primary decision makers in new construction and major renovation and remodeling projects: Program components address building owners, architects, engineers, contractors, builders, developers, energy consultants, and facilities personnel in all non-residential new construction projects. Equipment manufacturers and vendors will also be influenced as primary market actors increase demand for high efficiency building components. School districts will be specifically targeted as an underserved market for PY2001. For the purposes of this program element, eligible projects are defined as facilities where the building is still in the design stage of the project and include:
  - “ground-up” facilities that are being newly constructed in utility’s territory
  - permanent facility additions that add square footage to an existing structure
  - “gut-rehabilitation” of appropriate nonresidential facilities within the utility’s service territory
  - first-time and broad-scope tenant improvements to facilities involved with a change of tenant or occupancy
  - facility remodels involving replacement of at least half of one or more building energy systems
- End Uses: All energy-consuming systems supporting or housed within a new facility.

**c. Accomplishments/milestones/market effects observed to date**

- Program thresholds updated to introduce the market to new AB970 standards that became effective in June 2001.
- Brochure updated and reprinted to include Southern California Gas Company and natural gas measures.
- Cooperative display and presentation at the American Institute of Architects California Council Design Conference held in Monterey, California. Over 700 architects from across California were in attendance. More than 100 attended the session presented by Savings By Design dedicated to daylighting strategies, entitled “Building as Luminaire”.

- Statewide sponsorship of the Energy Efficiency Integration Awards, in cooperation with The American Institute of Architects, California council. Out of 15 entrants, four buildings were selected to be recognized for their superlative design, environmental sensitivity and innovative energy efficiency.

### **Energy Design Resources Program**

**a. *Description of program and program element/strategy***

- Provides an integrated package of design tools and information resources that promote the design and construction of high-performance buildings.
- A website is utilized to offer additional interactive resources and provide downloadable tools.
- Complements the Whole Building Approach strategies of the Savings By Design program.
- Provides validation of and peer recognition for designers and developers of exemplary projects that successfully incorporate principles of energy efficient design.

**b. *Market participants and/or end uses***

- Participants: The program targets two primary market actor groups within the new construction industry:
  - Designers (architects, engineers, lighting designers, energy consultants) and developers, including students of these disciplines, who establish the characteristics of new building projects through design and construction
  - Decision-makers who set the programmatic requirements for new building projects and can create a demand for energy efficiency facilities and design expertise
- End Uses: All energy-consuming systems supporting or housed within a new facility.

**c. *Accomplishments/milestones/market effects observed to date***

- Expanding the EDR website to include on-line learning for such topics as lighting, controls, luminaires, and other new technologies.
- Continuing a bi-weekly electronic newsletter that addresses energy efficiency and high performance technologies. Newsletter is distributed to all those registered on the statewide EDR website.
- Finalizing approvals, contracts and printing for the second edition of the EDR binder. To include 14 new Design Briefs, an in-depth integrated design case study, a Building Commissioning Manual, and an international daylighting research report.

### **Codes & Standards Program**

**a. *Description of program and program element/strategy***

Codes and Standards works to bring about upgrades in standards and codes, thereby capturing the benefits for society from California's diverse energy efficiency market transformation efforts.

Case for improvements are developed for promising design practices and technologies and then presented to standards and code setting bodies in a coordinated manner.

***b. Market participants and/or end uses***

Participants:

- Code-setting bodies such as the California Energy Commission, the US Department of Energy, and the Federal Trade Commission.
- Standards-setting, rating-setting, and research support organizations including: the American Society of Heating and Refrigerating and Air Conditioning Engineers, the Illuminating Engineering Society, the National Fenestration Rating Council, the Cool Roof Rating Council, the Institute of Transportation Engineers, the U.S. Green Building Council, and the California Institute for Energy Efficiency.
- Stakeholders to specific code enhancements including: the California Building Industry Association, Building Owners and Managers Association, manufacturing associations, and other industry groups and individuals.
- Code enforcers and enforcement organizations, such as, California Building Officials, and managers of energy efficiency programs.

***c. Accomplishments/milestones/market effects observed to date***

- A meeting/conference call was held in March to review a C.A.S.E. study for “Total Community Super Credit Project”, a “green” residential community built with narrower streets, shade trees, solar orientation of homes, and other attributes designed to improve energy efficiency.
- Continued support for permanent adoption of new residential and nonresidential building standards and appliance standards through attendance and advocacy during public meetings at the CEC.
- Sponsored residential and nonresidential Title 24 training sessions, addressing AB 970 code changes.

### **Crosscutting Program Activity**

Included within Southern California Edison's programs are various activities that help support each of the 14 programs. These activities include Energy Centers, Emerging Technologies, and Third-Party Initiatives.

### **Emerging Technologies**

(for detail see A. 00-11-043, p F-48)

#### ***Program Element Summary***

The Emerging Technologies activities focus on demonstrating energy efficiency options not widely adopted by various market actors. The program makes detailed designs of efficiency options and their performance information widely available.

In 2001, SCE will focus much of its attention on the promotion of energy efficiency that can achieve immediate energy savings and demand reductions. As a result, activities under the Emerging Technologies Showcasing program have been significantly scaled back. Nevertheless, SCE believes promotion of emerging technologies is a key factor to customer adoption of emerging energy efficiency technologies. To that end, SCE will continue to coordinate its ongoing showcase efforts with the Emerging Technologies Coordinating Counsel, maintain the Counsel's web site, and update the projects database on the web site. In addition, approximately six to eight showcase agreements will be signed in 2001. The showcasing results will be added to the Counsel's projects database. SCE will continue to work with other utilities and industry members in the development of future codes and standards.

#### ***Activities, Accomplishment, Market Progress, & Modifications:***

- Met with other utilities and CEC PIER program manager to co-ordinate the emerging technologies program under the ETCC.
- Installed 52 fans in a dairy farm to test the system efficiency to cool dairy cows in order improve the milk production.
- Started to test 8 high volume low speed cooling fans for dairy cows.
- Started the engineering analysis of a lighting system for a dairy barn.
- Installed a variable speed drive to a car-wash vacuum system.
- Converted a constant speed centrifugal chiller to a variable speed chiller at the Long Beach Aquarium.
- Completed the first draft of the educational materials for a CD-ROM to be used by industrial and commercial customers to optimize and diagnose their fluid pumping systems.
- Installed the refrigeration system to the newly developed HVAC testing laboratory for the Codes and Standards projects.

#### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$4,000

Revised: \$1,135\*

\* includes Codes and Standards activities.

## **Energy Centers - CTAC, AGTAC**

(for detail see A. 00-11-043, p F-53)

### ***Program Element Summary***

SCE possesses two distinct energy centers. The *Customer Technology Application Center (CTAC)*, which opened in 1990, is located central to the metropolitan Los Angeles County and Orange County regions. The *Agricultural Technology Application Center (AGTAC)* opened in 1996 and is located in the heart of the northern agricultural region of SCE service territory, the San Joaquin Valley. The centers are dedicated to the transfer of technology to the market place, including energy efficient technologies. The PGC goal of the centers is to intervene in the market place to enhance this diffusion of energy efficient technologies.

### ***Customer Technology Application Center (CTAC) -***

CTAC is a 45,000 square foot facility that is comprised of five technology centers: the Lighting Products Center, the Commercial Products Center, the Home Efficiency Center, the Industrial Technology Center, and the Foodservice Technology Center. CTAC also collaborates with a sixth center: the Refrigeration Technology Testing Center (RTTC) is part of the CTAC facility, but is funded through Showcasing activities. CTAC offers services to residential, commercial, and industrial customers. CTAC provides information on state-of-the art energy efficient technologies to customers, retailers, distributors, manufacturers, architects, engineers, and designers through, displays, training, demonstrations, and printed materials.

### ***The Agricultural Technology Application Center (AGTAC) -***

AGTAC is a multifaceted technology demonstration center located on a 10-acre site in Tulare, CA. The 16,000 square foot facility includes a 2,000 square foot Learning Center, a large Exhibit Hall, a Lighting Products Center and a Business Resource Center. Outside the building is a 4.5 acre Outdoor Demonstration Grounds. AGTAC's primary focus is with the agricultural community and agricultural processing. However, it also provides services and information to commercial, industrial and residential customers, and upstream actors.

### ***Activities, Accomplishment, Market Progress, & Modifications:***

Customer Technology Application Center (CTAC) –

CTAC set performance goals to increase EE activities by 10% over 2000 levels. The following shows CTACs second quarter results through June 2001.

	<b>2000 ACTUAL</b>	<b>2001 GOAL</b>	<b>YTD</b>
<b>Seminar Attendance</b>	1,019	1,158	1,394
<b>Joint Utility Classes</b>	3	6	2

- Phase 1 of a study to determine the feasibility of satellite energy centers was completed, the final due in April. Phase 1 will survey for the general location of target markets relative to the two centers. Through sophisticated techniques, maps were created showing clusters of customers identified by industry.

*The Agricultural Technology Application Center (AGTAC) –*  
 AGTAC set performance goals to increase EE activities by 10% over 2000 actual. The following shows AGTAC second quarter results through June 2001.

	<b>2000 ACTUAL</b>	<b>2001 GOAL</b>	<b>YTD</b>
<b>Seminar Attendance</b>	679	747	745
<b>Joint Utility Classes</b>	0	2	1

NOTES: High first quarter attendance figures are attributed to attendance of seasonal irrigation class offerings and completion of classes targeted to elementary students within the rural county of Tulare.

***Program Element Budget (\$000), Excluding General Support Activities:***

CTAC

Authorized: \$2,135

Revised: \$2,135

AGTAC

Authorized: \$634

Revised: \$688

<b>Third Party Initiatives</b>
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(for detail see A. 00-11-043, p. F-67)

SCE's Third Party Initiative (TPI) Program is designed to solicit innovative strategies and technologies from the marketplace. For 2001, there was a greater focus on cost-effectiveness and on projects aimed at achieving energy savings and demand reductions beginning in the summer of 2001.

***Element Activity, Accomplishments, Market Progress, & Modifications:***

More than 125 entities were notified directly by SCE of the opportunity to bid on this program, by e-mail or telephone, starting in late November. SCE received 51 proposals for the 2001 program by the closing date of January 31. By the end of March, ten winning bidders had been notified of their selection and invited to begin working on their project plans. In addition, four previously awarded TPI projects were selected for additional funding. Total projected expenditure on 2001 TPIs is \$6.4 million, as required by the Commission.

In the nonresidential sector, the most cost-effective projects with highest likelihood of achieving energy savings and demand reductions during Summer 2001 were selected. In the residential and new construction sectors, one project was selected on this basis, and the other projects were selected to meet other Commission goals and requirements for 2001. In general, SCE has found that TPI proposals are less cost-effective than SCE's programs.

SCE's experience with the Summer Initiative and the 2001 TPI Programs has demonstrated that the Third Party Program is better suited to testing a few innovative and experimental program concepts than to providing a balanced and integrated program portfolio and achieving near-term energy savings goals. Proposed projects in these last two rounds have been either high-cost alternatives to utility rebate and SPC programs or innovative outreach programs with low near-term energy savings.

SCE has awarded ten new purchase orders and is extending four previous ones for this program. SCE has verified that all vendors have begun work. SCE is concerned about performance and will continue to closely monitor progress. It is too early to tell whether the projects will meet their stated goals. Total projected expenditure on 2001 TPIs is \$6.4 million, as required by the Commission.

The following are the 2001 TPI results through June 30, 2001:

- 450,000 kWh energy savings and 0.2 MW peak demand reduction achieved.
- \$4,911,000 committed to newly selected TPI projects.
- \$1,244,000 allocated to extending previously selected TPI projects.
- \$244,000 allocated to administrative costs for all TPI projects.

The current PY2001 TPI projects are as follows:

### **1. Residential Retrofit Projects**

- Green Schools intensive pilot program in San Bernardino.
- Compact fluorescent lighting promotion and free sample project, including torchiere exchange events.
- Time-of-sale home energy efficiency audits with an air conditioning rebate offer.
- Improvement of energy usage analysis software for home remodeling decisions.

### **2. Nonresidential Retrofit Projects**

- Retrofits for beverage vending machines.
- Small/medium business air conditioning retrofits.
- Commercial building commissioning.
- Hard-to-reach small business lighting retrofit and HVAC enhancements.
- Small/medium commercial lighting audits, design and retrofits.

### **3. New Construction Projects**

- The Community Energy Efficiency program, working with local governments on increasing energy efficiency in the community and in new buildings and developments being permitted.
- A project to increase energy efficiency in new multi-family housing.
- A project to increase the energy efficiency of new manufactured homes.
- Enhancement of the E-Quest nonresidential energy efficiency design software.

### ***Program Element Budget (\$000), Excluding General Support Activities:***

Authorized: \$4,000  
Revised: \$6,390

## **Section 6: Program Summary Tables**

**Table 6.1**  
**Southern California Edison Company**  
 Program Portfolio Budget - YTD  
 PY2001  
 (\$ in millions)

Program	2000 Recorded Expenses	2001 Authorized Budget <sup>[1]</sup>	2001 Revised Budget <sup>[2]</sup>	YTD		2001 Total Actual + Committed
				Actual 06/30/2001	Commitments 06/30/2001	
<b>Residential Programs</b>						
<b>Heating and Cooling Systems</b>						
Residential Audits	0.928	0.475	0.475	0.138	0.039	0.176
Local Government Initiative	-	0.200	0.200	0.000	0.200	0.200
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.021	0.028	0.049
Mass Market Information	0.042	0.313	0.615	0.370	0.244	0.615
Emerging Technologies	0.500	0.300	0.135	0.009	0.126	0.135
Energy Centers - CTAC/AGTAC	0.071	0.172	0.172	0.041	0.131	0.172
TPI Administration/Solicitation Process	0.250	0.400	0.170	0.024	0.146	0.170
General Support Activities <sup>[3]</sup>	0.068	0.073	0.069	0.021	0.048	0.069
<b>Sub Total</b>	<b>2.038</b>	<b>2.062</b>	<b>1.916</b>	<b>0.625</b>	<b>0.961</b>	<b>1.586</b>
<b>Residential Lighting</b>						
Residential Audits	0.646	0.260	0.260	0.071	0.020	0.091
Local Government Initiative	-	0.300	0.300	0.001	0.299	0.300
Res EE Procurement Program (REEPP)	0.225	0.100	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.100	0.080	0.080	0.021	0.028	0.049
Mass Market Information	0.042	0.313	0.594	0.349	0.244	0.594
Energy Centers - CTAC/AGTAC	0.140	0.144	0.144	0.038	0.106	0.144
TPI Administration/Solicitation Process	0.250	0.400	0.873	0.126	0.747	0.873
Retail Initiative Lighting (Statewide)	2.839	2.450	3.200	0.433	2.767	3.200
Residential Contractor (Statewide)	0.600	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.104	0.147	0.203	0.061	0.142	0.203
<b>Sub Total</b>	<b>4.945</b>	<b>4.194</b>	<b>5.654</b>	<b>1.099</b>	<b>4.355</b>	<b>5.453</b>
<b>Residential Appliances</b>						
Residential Audits	0.386	0.215	0.215	0.067	0.019	0.086
Local Government Initiative	-	0.200	0.200	0.000	0.200	0.200
Res EE Procurement Program (REEPP)	0.480	0.300	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.045	0.080	0.080	0.021	0.028	0.049
Mass Market Information	0.042	0.313	0.855	0.610	0.244	0.855
Energy Centers - CTAC/AGTAC	0.105	0.103	0.103	0.024	0.079	0.103
TPI Administration/Solicitation Process	0.250	0.400	0.560	0.081	0.479	0.560
Residential Spare Refrigerator Recycling	7.130	7.500	7.500	3.782	2.719	6.502
Residential Appliance (D)	2.795	1.440	4.003	0.389	3.934	4.323
Residential Appliance (U)	3.649	0.625	0.250	0.020	0.230	0.250
General Support Activities <sup>[3]</sup>	0.484	0.407	0.513	0.154	0.360	0.513
<b>Sub Total</b>	<b>15.366</b>	<b>11.583</b>	<b>14.279</b>	<b>5.148</b>	<b>8.292</b>	<b>13.440</b>
<b>Residential Retrofit &amp; Renovation</b>						
Residential Audits	0.860	0.750	0.750	0.209	0.059	0.269
Local Government Initiative	-	0.200	0.200	0.000	0.200	0.200
Residential Contractor	5.041	8.378	4.817	0.821	3.435	4.256
Res EE Procurement Program (REEPP)	0.080	0.050	-	-	-	-
Calif Home Energy Eff Rating System (CHEERS)	0.075	0.060	0.060	0.016	0.021	0.037
Mass Market Information (Statewide)	0.042	0.313	0.553	0.308	0.244	0.553
Emerging Technologies	0.200	0.480	-	-	-	-
Energy Centers - CTAC/AGTAC	0.101	0.103	0.103	0.026	0.077	0.103
TPI Administration/Solicitation Process	0.253	0.400	0.400	0.058	0.342	0.400
Retail Initiative/Window/Frame System Labeling	0.703	-	-	-	-	-
HVAC Diagnostic Program (Check-Me)	0.121	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.182	0.391	0.257	0.077	0.180	0.257
<b>Sub Total</b>	<b>7.659</b>	<b>11.125</b>	<b>7.139</b>	<b>1.514</b>	<b>4.359</b>	<b>6.073</b>
<b>Residential Subtotal</b>	<b>\$ 30.008</b>	<b>\$ 28.964</b>	<b>\$ 28.987</b>	<b>\$ 8.386</b>	<b>\$ 17.967</b>	<b>\$ 26.552</b>

<sup>[1]</sup> 2001 Authorized Budget represents SCE's 2001 Energy Efficiency Budget as filed on November 15, 2000.

<sup>[2]</sup> 2001 Revised Budget includes fundshifts directed as part of D. 01-01-060 (OPNs 3b-c. 12) and fundshifts made by SCE as part of the revised program plans for 2001.

<sup>[3]</sup> Budget/recorded includes General Support Activities.

<sup>[4]</sup> Small Business Rental Upgrade Program Budget was shifted into the Small SPC Program

Program	2000	2001	2001	YTD		2000
	Year-end Actual + Committed	Proposed Budget <sup>[1]</sup>	Proposed Budget <sup>[2]</sup>	Actual 06/30/2001	Commitments 06/30/2001	Year-end Actual + Committed
<b>Nonresidential Programs</b>						
<b>Large Nonresidential Comprehensive Retrofit</b>						
Emerging Technologies	0.400	0.200	-	-	-	-
Mass Market Information	-	-	0.170	0.168	-	0.168
Energy Centers - CTAC/AGTAC	0.496	0.513	0.513	0.164	0.349	0.513
Agricultural/Pumping Services	1.075	1.058	1.058	0.482	0.576	1.058
Nonresidential SPC	9.162	4.475	1.221	0.055	1.182	1.238
Express Efficiency (Large)	-	-	2.250	0.420	1.830	2.250
Large Commercial Informational Services	0.150	0.066	0.141	0.130	0.011	0.141
Large Industrial Informational Services	0.150	0.070	0.120	0.056	0.064	0.120
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.498	0.268	0.239	0.072	0.168	0.239
<b>Sub Total</b>	<b>11.931</b>	<b>6.650</b>	<b>5.712</b>	<b>1.547</b>	<b>4.180</b>	<b>5.727</b>
<b>Small Nonresidential Comprehensive Retrofit</b>						
Mass Market Information (Statewide)	0.150	0.540	1.028	0.734	0.288	1.022
Emerging Technologies	0.350	0.200	0.300	0.072	0.228	0.300
Energy Centers - CTAC/AGTAC	0.332	0.333	0.333	0.108	0.225	0.333
TPI Administration/Solicitation Process	0.442	0.750	1.910	0.059	1.851	1.910
Small Business Survey & Services	1.103	0.700	0.683	0.220	0.463	0.683
Small SPC (Statewide) <sup>[4]</sup>	2.627	2.500	1.943	0.192	1.628	1.920
Agricultural/Pumping Services	0.499	0.536	0.536	0.245	0.291	0.536
Express Efficiency (Sm/Med)	3.893	6.433	8.678	2.034	10.260	12.294
Local Government Initiative	-	0.300	0.300	-	0.300	0.300
Small Business Space Rental Upgrade	-	0.500	-	-	-	-
General Support Activities <sup>[3]</sup>	0.241	0.466	0.586	0.175	0.411	0.586
<b>Sub Total</b>	<b>9.637</b>	<b>13.258</b>	<b>16.297</b>	<b>3.840</b>	<b>15.944</b>	<b>19.783</b>
<b>Nonresidential HVAC Turnover</b>						
Emerging Technologies	0.200	0.100	-	-	-	-
Mass Market Information	-	-	0.050	0.049	-	0.049
Energy Centers - CTAC/AGTAC	0.187	0.290	0.290	0.092	0.198	0.290
TPI Administration/Solicitation Process	-	0.250	0.811	0.025	0.786	0.811
Express Efficiency - Upstream HVAC	0.863	0.250	0.070	0.032	0.038	0.070
Express Efficiency (Sm/Med)	-	-	0.060	0.018	0.042	0.060
Express Efficiency (Large)	-	-	0.995	0.186	0.809	0.995
Nonresidential SPC	4.787	4.800	1.980	0.090	1.918	2.008
Large Commercial Informational Services	0.275	0.130	0.180	0.166	0.014	0.180
Large Industrial Informational Services	0.275	0.080	0.130	0.061	0.069	0.130
HVAC Commissioning Pilot Program	-	-	0.200	0.001	-	0.001
HVAC Diagnostic Program (Check-Me)	0.119	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.291	0.310	0.260	0.078	0.182	0.260
<b>Sub Total</b>	<b>6.997</b>	<b>6.210</b>	<b>5.026</b>	<b>0.798</b>	<b>4.056</b>	<b>4.854</b>
<b>Motor Turnover</b>						
Emerging Technologies	0.100	0.070	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.124	0.135	0.135	0.048	0.087	0.135
Agricultural/Pumping Services	0.222	0.262	0.262	0.122	0.140	0.262
Express Efficiency - Upstream Motors	0.795	0.500	0.370	0.144	0.226	0.370
Nonresidential SPC	0.609	1.200	0.540	0.025	0.523	0.548
Large Commercial Informational Services	0.050	0.034	0.084	0.077	0.007	0.084
Large Industrial Informational Services	0.050	0.020	0.070	0.033	0.037	0.070
Agricultural Energy Efficiency Incentives	0.273	-	-	-	-	-
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.071	0.099	0.073	0.022	0.051	0.073
<b>Sub Total</b>	<b>2.294</b>	<b>2.320</b>	<b>1.549</b>	<b>0.486</b>	<b>1.071</b>	<b>1.557</b>

<b>Nonresidential Process Overhaul</b>						
Emerging Technologies	0.200	0.080	-	-	-	-
Mass Market Information	-	-	0.015	0.015	-	0.015
Energy Centers - CTAC/AGTAC	0.168	0.170	0.170	0.058	0.112	0.170
Agricultural/Pumping Services	0.259	0.244	0.244	0.114	0.130	0.244
Nonresidential SPC	3.287	1.200	0.800	0.036	0.775	0.811
Large Industrial Informational Services	0.335	0.080	0.105	0.049	0.056	0.105
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities <sup>(3)</sup>	0.181	0.123	0.078	0.023	0.055	0.078
<b>Sub Total</b>	<b>4.431</b>	<b>1.897</b>	<b>1.412</b>	<b>0.295</b>	<b>1.128</b>	<b>1.423</b>
<b>Commercial Remodeling Renovation</b>						
Emerging Technologies	0.825	0.900	-	-	-	-
Mass Market Information	-	-	0.066	0.065	-	0.065
Energy Centers - CTAC/AGTAC	0.472	0.485	0.485	0.155	0.330	0.485
Nonresidential SPC	1.218	1.575	1.486	0.068	1.440	1.507
Express Efficiency (Large)	-	-	1.200	0.224	0.976	1.200
Large Commercial Informational Services	0.250	0.120	0.170	0.157	0.013	0.170
Large Industrial Informational Services	-	0.100	0.150	0.070	0.080	0.150
Savings By Design	2.000	1.700	1.150	0.326	0.670	0.997
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities <sup>(3)</sup>	0.153	0.222	0.198	0.059	0.138	0.198
<b>Sub Total</b>	<b>4.918</b>	<b>5.102</b>	<b>4.905</b>	<b>1.124</b>	<b>3.648</b>	<b>4.772</b>
<b>Nonresidential Subtotal</b>	<b>40.207</b>	<b>35.436</b>	<b>34.900</b>	<b>8.088</b>	<b>30.026</b>	<b>38.115</b>

Program	2000 Year-end Actual + Committed	2001 Proposed Budget <sup>[1]</sup>	2001 Proposed Budget <sup>[2]</sup>	YTD		2000 Year-end Actual + Committed
				Actual 06/30/2001	Commitments 06/30/2001	
<b>New Construction Programs</b>						
<b>Residential New Construction</b>						
Emerging Technologies	0.200	0.170	-	0.004	-	0.004
Mass Market Information	-	0.030	0.355	0.355	-	0.355
Energy Centers - CTAC/AGTAC	0.128	0.136	0.136	0.038	0.098	0.136
TPI Administration/Solicitation Process	0.382	0.400	0.892	0.105	0.787	0.892
Residential New Construction	3.255	3.750	3.074	0.174	0.325	0.499
Local Government Initiatives	-	0.800	0.800	-	0.800	0.800
General Support Activities <sup>[3]</sup>	0.087	0.193	0.196	0.059	0.137	0.196
<b>Sub Total</b>	<b>4.051</b>	<b>5.479</b>	<b>5.453</b>	<b>0.736</b>	<b>2.147</b>	<b>2.883</b>
<b>Commercial New Construction</b>						
Emerging Technologies	0.725	0.600	-	-	-	-
Mass Market Information	-	-	0.077	0.077	-	0.077
Energy Centers - CTAC/AGTAC	0.077	0.108	0.108	0.045	0.063	0.108
TPI Administration/Solicitation Process	0.402	0.750	0.474	0.056	0.418	0.474
Savings By Design	2.827	4.500	7.076	0.919	2.313	3.233
Energy Design Resources	1.300	1.200	0.100	0.021	0.079	0.100
General Support Activities <sup>[3]</sup>	0.134	0.261	0.292	0.087	0.205	0.292
<b>Sub Total</b>	<b>5.464</b>	<b>7.419</b>	<b>8.127</b>	<b>1.207</b>	<b>3.077</b>	<b>4.283</b>
<b>Industrial and Agricultural New Construction</b>						
Emerging Technologies	0.200	0.200	-	-	-	-
Energy Centers - CTAC/AGTAC	0.060	0.084	0.084	0.035	0.049	0.084
Savings By Design (statewide)	0.500	0.800	0.800	0.104	0.262	0.365
Energy Efficiency Incentives	0.481	-	-	-	-	-
TPI Administration/Solicitation Process	-	-	-	-	-	-
General Support Activities <sup>[3]</sup>	0.097	0.040	0.033	0.010	0.023	0.033
<b>Sub Total</b>	<b>1.338</b>	<b>1.124</b>	<b>0.917</b>	<b>0.149</b>	<b>0.334</b>	<b>0.482</b>
<b>New Construction Codes &amp; Standards Support and Local Government Initiatives</b>						
Emerging Technologies	0.700	0.700	0.700	0.019	0.681	0.700
Energy Centers - CTAC/AGTAC	0.033	0.047	0.047	0.020	0.027	0.047
TPI Administration/Solicitation Process	0.018	0.250	0.300	0.035	0.265	0.300
Local Government Initiatives	0.687	0.400	0.385	0.080	0.305	0.385
General Support Activities <sup>[3]</sup>	0.043	0.051	0.053	0.016	0.037	0.053
<b>Sub Total</b>	<b>1.481</b>	<b>1.448</b>	<b>1.485</b>	<b>0.170</b>	<b>1.315</b>	<b>1.485</b>
<b>New Construction Subtotal</b>	<b>12.334</b>	<b>15.469</b>	<b>15.982</b>	<b>2.261</b>	<b>6.872</b>	<b>9.134</b>
<b>TOTALS</b>	<b>82.548</b>	<b>79.869</b>	<b>79.869</b>	<b>18.736</b>	<b>54.865</b>	<b>73.801</b>

**Table 6.2**  
**Southern California Edison Company**

Energy Efficiency Program Energy and Demand Reductions - YTD

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
<b>Residential Programs</b>			
<b>Heating and Cooling Systems</b>			
Residential Audits	764	0.26	
Local Government Initiative	26	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	37	0.01	
Mass Market Information			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>826</b>	<b>0.27</b>	<b>-</b>
<b>Residential Lighting</b>			
Residential Audits	418	0.14	
Local Government Initiative	39	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	37	0.01	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Lighting (Statewide)	29,056	25.77	
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>29,549</b>	<b>25.92</b>	<b>-</b>
<b>Residential Appliances</b>			
Residential Audits	346	0.12	
Local Government Initiative	26	-	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	37	0.01	
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential Spare Refrigerator Recycling	39,422	5.94	
Residential Appliance (D)	9,828	8.65	
Residential Appliance (U)			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>49,658</b>	<b>14.71</b>	<b>-</b>
<b>Residential Retrofit &amp; Renovation</b>			
Residential Audits	1,206	0.41	
Local Government Initiative	26	-	
Residential Contractor - Single Family (Statewide)	3,354	1.47	
Residential Contractor - Multi Family (Statewide)	8,480	0.20	
Residential Contractor	11,834	0.20	
Res EE Procurement Program (REEPP)			
Calif Home Energy Eff Rating System (CHEERS)	28	0.01	
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Retail Initiative Window/Frame System Labeling			
HVAC Diagnostic Program (Check-Me)			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>13,093</b>	<b>0.62</b>	<b>-</b>
<b>Residential Subtotal</b>	<b>93,127</b>	<b>41.52</b>	<b>-</b>

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
<b>Nonresidential Programs</b>			
<b><i>Large Nonresidential Comprehensive Retrofit</i></b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	6,002	1.43	
Nonresidential SPC	5,422	2.25	
Express Efficiency (Large)	54,986	13.39	
Large Commercial Informational Services			
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>66,411</b>	<b>17.07</b>	<b>-</b>
<b><i>Small Nonresidential Comprehensive Retrofit</i></b>			
Mass Market Information (Statewide)			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Small Business Survey & Services	1,136	0.20	
Small SPC (Statewide)	4,381	1.09	
Agricultural/Pumping Services	3,041	0.72	
Express Efficiency (Sm/Med)	79,500	16.65	
Local Government Initiative			
Small Business Space Rental Upgrade			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>88,057</b>	<b>18.66</b>	<b>-</b>
<b><i>Nonresidential HVAC Turnover</i></b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Express Efficiency - Upstream HVAC			
Express Efficiency (Sm/Med)	-	-	
Express Efficiency (Large)	24,316	5.92	
Nonresidential SPC	8,797	3.65	
Large Commercial Informational Services			
Large Industrial Informational Services			
HVAC Commissioning Pilot Program			
HVAC Diagnostic Program (Check-Me)			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>33,113</b>	<b>9.57</b>	<b>-</b>

<b>Motor Turnover</b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	1,486	0.35	
Express Efficiency - Upstream Motors	454	0.09	
Nonresidential SPC	2,399	0.99	
Large Commercial Informational Services			
Large Industrial Informational Services			
Agricultural Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>4,339</b>	<b>1.44</b>	<b>-</b>
<b>Nonresidential Process Overhaul</b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Agricultural/Pumping Services	1,384	0.33	
Nonresidential SPC	3,554	1.47	
Large Industrial Informational Services			
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>4,938</b>	<b>1.80</b>	<b>-</b>
<b>Commercial Remodeling Renovation</b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
Nonresidential SPC	6,603	2.74	
Express Efficiency (Large)	29,326	7.14	
Large Commercial Informational Services			
Large Industrial Informational Services			
Savings By Design	10,860	2.10	
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	<b>46,789</b>	<b>11.98</b>	<b>-</b>
<b>Nonresidential Subtotal</b>	<b>243,648</b>	<b>60.52</b>	<b>-</b>

Program	YTD		
	Energy (MWH)	Demand (MW)	Gas (Therms)
<b>New Construction Programs</b>			
<b>Residential New Construction</b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Residential New Construction	585	0.00	
Local Government Initiatives			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	585	0.00	-
<b>Commercial New Construction</b>			
Emerging Technologies			
Mass Market Information			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Savings By Design	11,842	1.70	
Energy Design Resources			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	11,842	1.70	-
<b>Industrial and Agricultural New Construction</b>			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
Savings By Design (statewide)	1,339	0.19	
Energy Efficiency Incentives			
TPI Administration/Solicitation Process			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	1,339	0.19	-
<b>New Construction Codes &amp; Standards Support and Local Government Initiatives</b>			
Emerging Technologies			
Energy Centers - CTAC/AGTAC			
TPI Administration/Solicitation Process			
Local Government Initiatives			
General Support Activities <sup>[3]</sup>			
<b>Sub Total</b>	-	-	-
<b>New Construction Subtotal</b>	<b>13,766</b>	<b>1.90</b>	<b>-</b>

<b>TOTALS</b>	<b>350,540</b>	<b>103.94</b>	<b>-</b>
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TABLE 6.3  
 STATEWIDE AND CROSSCUTTING PROGRAM BUDGET AND EXPENDITURE - YTD  
 PY 2001  
 (\$ millions)

Program	PG&E					SoCal Gas					SoCal Edison				
	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total	Authorized Budget	Revised Budget	Actual	Commitments	Total
Residential Contractor Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Single Family RCP <sup>3</sup>	9.28	9.28	3.06	3.86	6.91	4.77	4.22	1.46	3.90	5.36	5.94	2.67	0.76	1.40	2.16
Multi-Family RCP <sup>4</sup>	4.39	4.39	0.09	1.51	1.60	1.10	1.10	0.02	0.91	0.93	2.44	2.15	0.06	2.03	2.09
Upstream Lighting Program	1.63	1.63	0.43	0.15	0.57	-	-	-	-	-	2.45	3.20	0.43	2.77	3.20
Upstream Appliance Program	10.90	10.90	0.48	3.54	4.01	0.51	0.51	0.41	0.18	0.59	0.63	0.25	0.02	0.23	0.25
Statewide Residential Energy Guide	0.08	0.08	0.02	-	0.02	0.13	0.08	-	-	-	0.77	0.77	0.06	0.71	0.77
Large SPC Program	13.21	13.21	1.31	17.06	18.37	-	-	-	-	-	15.75	6.03	0.27	5.84	6.11
Small SPC Program	1.00	1.00	2.02	1.94	3.95	-	-	-	-	-	-	1.94	0.19	1.63	1.82
Express Efficiency Program <sup>1</sup>	23.00	23.00	4.30	8.50	12.79	0.51	0.51	0.04	-	0.04	6.43	13.18	2.88	10.30	13.18
Statewide Business Energy Guide	-	-	-	-	-	0.13	0.08	-	-	-	0.40	0.32	0.06	0.26	0.32
Savings By Design Program <sup>2</sup>	10.05	10.05	2.35	5.86	8.21	1.13	1.13	0.19	0.33	0.52	6.70	9.03	1.29	3.24	4.53
Energy Design Resources Program	1.99	1.99	0.16	0.86	1.02	-	-	-	-	-	1.20	0.10	0.02	0.08	0.10
Codes and Standards Support Effort	1.41	1.41	0.19	1.07	1.25	0.30	0.30	0.01	-	0.01	0.70	0.70	0.02	0.68	0.70
Emerging Technologies	0.10	0.10	0.00	0.10	0.10	2.52	1.73	0.65	0.76	1.41	3.30	0.44	0.09	0.35	0.44
Energy Centers	2.80	2.80	1.39	-	1.39	1.96	1.96	0.98	-	0.98	2.82	2.82	0.89	1.93	2.82
<b>Statewide Program Total</b>	<b>79.83</b>	<b>79.83</b>	<b>15.78</b>	<b>44.42</b>	<b>60.20</b>	<b>13.06</b>	<b>11.62</b>	<b>3.76</b>	<b>6.08</b>	<b>9.84</b>	<b>49.53</b>	<b>43.59</b>	<b>7.05</b>	<b>31.45</b>	<b>38.50</b>

<sup>1</sup> PG&E Express Efficiency is downstream only

<sup>2</sup> PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design

<sup>3</sup> Budget for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate

<sup>4</sup> Budget for SDG&E Residential Contractor Program Multifamily (RCPMF) also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

TABLE 6.4  
STATEWIDE AND CROSS-CUTTING PROGRAM ENERGY AND DEMAND NET REDUCTIONS - YTD  
PY2001

Program	PG&E			SoCal Gas			SoCal Edison			SDG&E			Statewide Total		
	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms	Energy MWh	Demand MW	Gas Therms
Residential Contractor Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Single Family RCP <sup>3</sup>	5,444	8.21	1,141,803	4,600	1.12	741,911	3,354	1.47	-	4,076	5.11	303,983	17,475	15.91	2,187,697
Multi-Family RCP <sup>4</sup>	7,497	1.36	320,799	-	-	851,241	8,480	0.20	-	11,947	0.62	1,013,305	27,924	2.18	2,185,345
Upstream Lighting Program	4,840	0.24	-	-	-	-	29,056	25.77	-	-	0.48	-	33,896	26.49	-
Upstream Appliance Program	16,039	2.85	180,568	-	-	51,616	-	-	-	-	-	-	16,039	2.85	232,184
Statewide Residential Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Large SPC Program	37,548	17.55	2,984,797	-	-	-	26,776	11.10	-	18,190	5.19	217,920	82,514	33.84	3,202,716
Small SPC Program	5,158	1.54	100,601	-	-	-	6,869	1.28	-	8,076	1.69	90,181	20,103	4.50	190,782
Express Efficiency Program <sup>1</sup>	164,309	28.96	454,488	-	-	27,826	188,129	43.11	-	3,992	1.71	3	356,430	73.78	482,317
Statewide Business Energy Guide	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Savings By Design Program <sup>2</sup>	19,222	9.42	294,426	3,300	0.50	15,000	24,040	4.00	-	12,306	2.06	330,925	58,868	15.98	640,351
Energy Design Resources Program	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Codes and Standards Support Effort	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Emerging Technologies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Energy Centers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Statewide Program Total</b>	<b>260,057</b>	<b>70.11</b>	<b>5,477,482</b>	<b>7,900</b>	<b>1.62</b>	<b>1,687,594</b>	<b>286,704</b>	<b>86.92</b>	<b>-</b>	<b>58,588</b>	<b>16.87</b>	<b>1,956,316</b>	<b>613,250</b>	<b>175.52</b>	<b>9,121,392</b>

<sup>1</sup> PG&E Express Efficiency is downstream only

<sup>2</sup> PG&E and SDG&E Savings By Design includes only the New Construction Savings By Design

<sup>3</sup> Savings for SDG&E Residential Contractor Program Single Family (RCPSF) also includes the savings for the Single Family Rebate

<sup>4</sup> Savings for SDG&E Residential Contractor Program Multifamil (RCPMF) also includes the Small Complex Self-Sponsorship/ SCSSP and Lighting and Appliance Replacement

## **Section 7: Market Assessment & Evaluation Studies**

***Southern California Edison Company's  
Statewide and Utility-Level Evaluation Projects***

<b>Study Area</b>	<b>Project ID</b>	<b>Project Title</b>	<b>Project Description</b>	<b>Project Objective (or milestone addressed for utility-level studies)</b>	<b>Lead Utility</b>	<b>Contact (Project/Area Manager)</b>	<b>Budget</b>	<b>Project Status</b>	<b>Expected Date of Completed Report</b>
<b><i>Statewide Studies PY 2000</i></b>									
NEW CONSTRUCTION	SW015	NRNC Market Characteristics & Program Activities Tracking	Describe NRNC mkt and track changes over time so that NRNC activities can adapt and prioritize efforts to meet needs of diverse segments. Track activity and penetration of the statewide NRNC program, Savings By Design (SBD).	Develop standardized reports on characteristics of NRNC mkt (construction value & volume, bldg types, owner types, design team characteristics, etc), and present quarterly summary reports.	SCE	Douglas Mahone	\$ 486,000	Data Collection	03/30/2002

NEW CONSTRUCTION	SW016	NRNC Building Efficiency and Program Process Assessment	Data developed on ongoing basis. Quantify whole bldg and end use savings and efficiencies of both SBD part & nonpart bldgs. Collect process data (attitudes, practices) re the Statewide Savings By Design Program by interviewing active program participants as they go through program process. Results will provide immediate feedback to program mgrs and policy makers.	1) Conduct detailed onsite surveys and build DOE-2 models of ea bldg in the sample. Calculate energy savings by end use for whole bldgs. Devp quantifiable info on changes in bldg efficiency attributable to Savings By Design program. 2) Establish an early baseline of program part attitudes & response to Program. Data will be gathered regularly to track changes over time.	SCE	Douglas Mahone	\$ 640,000	Data Collection	12/30/2002
NEW CONSTRUCTION	SW018	NR Codes & Standards	Review and explain C&S statewide program work targeted at Title 24 upgrades in 2001 and 2004.	1) Summarize on-going nonresidential codes and standards work, 2) Highlight linkages with other MT program activities that could feed into C&S area, 3) Project C&S program effects.	SCE	Douglas Mahone	\$ -	Cancelled	-

NEW CONSTRUCTION	SW019	Relocatable Classrooms	Baseline study and program review of existing pilot program. Market characterization and review of program potential.	1) Characterize market and current actors, 2) Estimate market size and energy savings potential statewide, 3) Review current pilot program findings and successes.	SCE	Douglas Mahone	\$ -	Cancelled	-
NONRESIDENTIAL	SW023	Market Research on Large Nonresidential Customer Wants and Needs	Unique effort to identify the needs and wants of large customers in specific industry segments	Input for program design	SCE	Pierre Landry	\$ 180,000	Completed	03/16/2001
NONRESIDENTIAL	SW024	Market Research on the Decision to Become an Energy Efficiency Service Provider (EESP)	Interviews with EESPs and non EESPs	Performance Contracting performance improvement by bringing in new EESP players	SCE	Pierre Landry	\$ 70,000	Analysis	08/31/2001
NONRESIDENTIAL	SW025	Success Stories of Business to Business Services	Project has been rolled into SW024 for completion and reporting. It is an investigation into the business of providing business services.	Develop business strategies for EESPs in California	SCE	Pierre Landry	\$ -	Rolled into SW024	
NONRESIDENTIAL	SW026	Evaluation of PY2000 Nonresidential SPC Program	Process evaluation with estimates of eventual program impacts	Recommendations for program improvements and estimates of net energy impacts	SCE	Pierre Landry	\$ 235,000	Data Collection	09/30/2001
NONRESIDENTIAL	SW027	Evaluation of PY2000 C/I Energy Efficiency Information Program	Statewide process and impact evaluation for C&I EE Information Programs	1) Determine accomplishment of program objectives. 2) Estimate program net behavioral impact.	SCE	Pierre Landry	\$ -	Cancelled	

GENERAL PURPOSE	SW031	Market Share Tracking (2000)	Establish market share baseline for various types of high-efficiency residential measures and track movement of market share over time	To monitor the changing level of energy efficient market shares for various targeted end use measure. The California Lamp Report 2000, Vol II is available as of April 19, 2001.	SCE	Richard Pulliam	\$ 477,225	Data Collection	08/30/2001
RESIDENTIAL	SW032	Statewide Study of Customer Remodeling Decisions	Customer decision making study; remodeling scope and components considered; consumer's decision making process including awareness of options and sources of information; reasons for considering remodeling project; importance of various attributes in the decisions including first cost, project features (energy efficiency), installation practices, contractors, subcontractors, etc.	Developing a profile of home owners in CA who plan to or have recently remodeled and developing segmentation. Look at key drivers and see how they affect decision making. Identify barriers to choices of EE, key information, and delivery channels for remodeling.	SCE	Shahana Samiullah	\$ 125,000	Final Reporting	07/15/2001

RESIDENTIAL	SW033	Process Evaluation of PY 2000 Residential Contracting Program (RCP)	Examine the proceedures and processes used to promote and implement the Statewide RPC program and make recommendations for improving proceedures and processes.	Document how PY2000 programs were designed & intended to achieve sustainable changes in the mkt in Year 2000. Characterize how they did work. Develop program recommendations to improve future RCP.	SCE	Shahana Samiullah	\$ 110,000	Completed	06/30/2001
<b>Sub-Total PY2000</b>							\$ 2,323,225		

**Utility-level Studies PY 2000**

GENERAL PURPOSE	US108	Nonresidential Customer Classification Coding Project	Assigns SIC and NAICS codes for all nonresidential customer accounts	Accurate SIC and NAICS codes for all nonresidential customers. Develop and refine software system for analysis.	SCE	Michael Redding	\$ 120,000	Data Collection	No Report Planned
GENERAL PURPOSE	US109	Weather Data System Project	Gather, store, and provide access to weather data from the 24 SCE weather stations.	Provide historical and current weather data for energy efficiency analyses.	SCE	Michael Redding	\$ 130,000	Data Collection	No Report Planned
RESIDENTIAL	US110	Residential Refrigeration Performance Milestone	Identify total and energy efficient retailer floor stock of refrigerators in SCE territory.	Determine change in proportion of energy efficient refrigerator floor stock.	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001
RESIDENTIAL	US111	Residential Window Performance Milestone	Identify inventory and Energy Star rated inventory and stocking levels	Determine % change in floor stock of Energy Star rated windows	SCE	Shahana Samiullah	\$ 30,000	Completed	04/01/2001
RESIDENTIAL	US112	Residential Energy Efficient Window Awareness Study	National survey being used to determine residential awareness of energy efficient windows.	Determine customer awareness of high performance windows.	SCE	Marian Brown	\$ 5,000	Completed	05/01/2001

NONRESIDENTIAL	US113	Nonresidential HVAC Diagnostic Contractor Survey	Report on contractor technician training and use of HVAC diagnostic tool (CHECKMe!)	Identify the increased number of technicians trained and using the tool. This information will be included in the workpapers of the 2001 AEAP filing.	SCE	Marian Brown	\$ -	Completed	05/01/2001
RESIDENTIAL	US114	New Home Energy Efficiency Milestone Report	Gather data on total new single family homes permitted during 2000 and the number exceeding Title 24 by 10% or more.	Identify proportions of new single family homes exceeding Title 24 by 10% or more. Documentation completed by Program Staff.	SCE	Marian Brown	\$ -	Completed	05/01/2001
NONRESIDENTIAL	US115	Small Commercial Do-It-Yourself Energy Survey Study	Evaluate how many measures are implemented, baseline levels, and customer expectations.	To establish baseline estimates of customer adoption rate, and to establish customer expectations.	SCE	Angela Jones	\$ 38,261	Completed	03/30/2001

NONRESIDENTIAL	US116	Evaluation of SCE's Emerging Technology Showcase Program	Two phase evaluation of the emerging technology program. Phase one estimates baseline levels of awareness, attitudes, knowledge and behavior, Phase 2 is devoted to measuring changes in baseline estimates along with any near term market effects.	1) measure baseline awareness of targeted emerging technologies, 2) develop a program theory, hypotheses, and indicators of market effects, 3) measure changes in awareness and any near term market effects of those directly exposed to showcases.	SCE	Angela Jones	\$ 150,000	Between Phases	05/01/2002	
NONRESIDENTIAL	US117	Evaluation of SCE's Technology Applications Centers (CTAC & AgTAC)	Market effects and baseline awareness study of CTAC and AgTAC	1) conduct market effects study of CTAC & AgTAC, 2) complete basic process evaluation, 3) conduct a baseline study to assess customer awareness of CTAC and AgTAC.	SCE	Angela Jones	\$ 130,000	Completed	09/11/2000	
RESIDENTIAL	US118	Marketing Training for Residential New Construction Sales Agents	Pre- and post-training testing of builder sales agents on marketing energy efficient features in new construction.	To determine increases in builder staff awareness of opportunities to market energy efficiency. Testing done for PY99 program.	SCE	Marian Brown	\$ -	Cancelled	-	
							<b>Sub-Total PY2000</b>	\$ 633,261		
							<b>Total PY2000</b>	\$ 2,956,486		

**Statewide Studies PY 2001**

RESIDENTIAL	SW048	Statewide Residential Customer Needs Assessment Study	<p>This study was sought by some stakeholders and ordered by the Administrative Law Judge on October 25, 2000. The overall research objective is to assess the needs of residential customers, with a particular focus on hard-to-reach customers, as they relate to greater program participation and adoption of energy efficiency measures. Additionally, the intent is to develop outreach strategies and program design features to foster program participation and measure adoption. The proposed study will specially focus on hard-to-reach residential customer segments defined as multi-family housing; tenants; limited-English speaking customers; moderate-income customers; and rural customers.</p>	<p>1. Provide in a single summary study a variety of information on the needs of the residential customer segments, with a particular focus on the segments identified as hard-to-reach: multi-family housing; tenants; limited-English speaking customers; moderate income customers; and rural customers; 2. Use the information gathered to suggest outreach strategies and program design features to foster greater program participation among hard-to-reach customer groups to promote the residential programs; and 3. Use the needs information to suggest program design features that can increase customer adoption of measures promoted through the residential programs.</p>	SCE	Shahana Samiullah	\$ 89,775	Draft Reporting	07/15/2001
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NONRESIDENTIAL	SW053	Process Evaluation of PY2001 SPC Program	Process evaluation to assist in planning the 2002 SPC Program	Investigating whether program changes for 2001 affect who participates and why.	SCE	Pierre Landry	\$ 60,000	Data Collection	09/30/2001	
<b>Total PY2001</b>							\$	149,775		

***Pacific Gas & Electric Company's  
Statewide and Utility-Level Evaluation Projects***

<b>Study Area</b>	<b>Project ID</b>	<b>Project Title</b>	<b>Project Description</b>	<b>Project Objective (or milestone addressed for utility-level studies)</b>	<b>Lead Utility</b>	<b>Contact (Project/Area Manager)</b>	<b>Budget</b>	<b>Project Status</b>	<b>Expected Date of Completed Report</b>
<i>Statewide Studies PY 2000</i>									

NONRESIDENTIAL	SW021	Statewide Industrial Sector Study	<p>1) Existing utility records, program tracking databases and recent evaluations will be used to characterize industrial customers by SIC2 code, energy use, end-use, location, size, history of participation in energy efficiency programs, etc. 2) Search for patterns of success in the industrial mkt sector and identify whether lessons learned can be applied in areas where improvement is currently needed. 3) Work closely with project/area mgrs responsible for other nonres statewide MA&amp;E activities to ensure adequate attention paid to industrial information needs.</p>	<p>This current study will detect and analyze patterns related to industrial sector energy efficiency. Latter studies will provide instances of successfully transformed industrial mkts will be identified and studied on a case-by-case basis. Primary focus may be on demonstration projects and partnerships with integrated energy efficiency/waste reduction/water savings, etc. Future studies may track activity specifically related to industrial mkt sector using data from current, ongoing nonres MA&amp;E efforts. A series of industrial-specific MA&amp;E activity reports may be presented as a result of this research</p>	PG&E	Rafael Friedmann	\$ 200,000	Final Reporting	08/15/2001
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NEW CONSTRUCTION	SW028	Investigate Builder Compliance to Title 24	<p>This study will provide a baseline for residential new construction practices. The purpose of this study is to determine the barriers to builders not complying with Title 24, the differences between builders who do not comply and builders who exceed Title 24. This study will attempt to determine kinds of incentives are needed to encourage builders to meet Energy Star standards. It will attempt to determine how the July 1999 changes to Title 24 impact builder practices.</p>	<p>Identify proportion of builders who are not complying and to characterize them in terms of noncompliance; demographically (ie climate zone, type of homes built, measure installed, etc.).</p>	PG&E	Mary Kay Gobris	\$ 350,000	Draft Reporting	08/31/2001
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NEW CONSTRUCTION	SW029	Market Effects Tracking of Residential New Construction	<p>This study will examine the impact that each utilities RNC program has on customer awareness of energy efficiency options, builders practices in promoting and implementing greater than Title 24 standards for RNC, Realtors promotion of energy efficient RNC, and how lenders and appraisers consider energy efficiency in the lending and appraisal processes. This is a two year study with comparisons to prior years results. The study for the 2000 program will begin in the first quarter of 2001 and will end by July/Aug 2001. There will be similar dates for the 2001 program.</p>	<p>Scope of this project has changed to reflect less emphasis on market transformation. Most of the emphases is now on impact of builder training programs. Also includes changes in builder practices due to the energy crisis and how builders will be complying with new T-24.</p>	PG&E	Mary Kay Gobris	\$ 200,000	Draft Reporting	08/31/2001
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				Provide initial or updated feedback on programs or intervention strategies not covered in Project SW041. One or more individual or combined mkt assessment and eval studies will be conducted focusing on energy audits, website tools, energy centers, modeling. 2) a) Provide updated info on end-user & supply-side actor energy effic attitudes & practices; b) process eval feedback on py2001 program interventions; 3) Improve understanding of sub-segment differences in efficiency related attitudes, barriers, and practices among nonres customers. Depending on final scope, results of analyses conducted will be used to ID key leverage points by sub-mkt						
NONRESIDENTIAL	SW039	Studies of Small/Medium Nonresidential Program Elements	1) Assessment of market potential for energy efficiecnyn in the nonres sector. 2) Continue to study, evaluate & support program interventions in sm nonres mkt. 3) Hard to reach participation analysis. 4) Needs assessment for small nonres customers. 5) MA&E tracking in small nonres sector, 6) Express Efficiency tracking		PG&E	Chris Ann Dickerson	\$ 1,200,000	Analysis	12/31/2001	
							<b>Total PY2000</b>	\$ 1,950,000		
<b>Utility-level Studies PY 2000</b> - There are no MA&E utility specific studies occurring in PY2000										

**Statewide Studies PY 2001**

RESIDENTIAL	SW049	Summer Initiative Pool Pump Program Evaluation	Market characterization, baseline, and post impact evaluation of the program.	To assess the peak impacts of the pool pumps program.	PG&E	Marty Kurtovich	\$ 181,230	Data Collection	12/30/2001
RESIDENTIAL	SW050	M&V Study for 2001 RNC Programs	Will provide estimates and energy and demand for measures typically installed as part of residential new construction programs. This study will determine energy savings from energy efficiency measures that exceed Title 24 requirements. Since Title 24 regulations were be revised in July 1999, the previous savings estimates need to be updated to reflect changes in Title 24. The results of this study will be used to prepare estimates of the peak and energy savings impacts of PY 2001 programs.	Using the results of the Title 24 simulation models (Builder Compliance to Title 24) and results of previous evaluations, determine energy savings. This study will utilize the results from Builder Compliance to Title 24 particularly the "as built" building characteristics of residential new construction.	PG&E	Mary Kay Gobris	\$ 100,000	Project Initiation	08/31/2001

NONRESIDENTIAL	SW054	Industrial Sector Case Studies	<p>The purpose of the research is to search for patterns of success in the industrial market sector and to identify whether lessons learned from the successes can be applied in areas where improvement is currently needed. The focus will be on the industries and/or end-uses with significant demand reduction potential and/or industrial markets that can be considered as under-served.</p>	<p>Instances of successfully "transformed" markets in the industrial sector - especially "transformed" decision-processes in companies that now make energy-efficient decisions without assistance from utility programs will be identified and studied on a case-by-case basis. A primary focus of this research will be on demonstration projects and partnerships with an integrated energy-efficient-waste reduction/water savings, etc., focus, as these projects offer opportunities for high profile savings with the potential to attract the interest of decision-makers at other facilities.</p>	PG&E	Rafael Friedmann	\$ 500,000	Pre-RFP	03/30/2002
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NONRESIDENTIAL	SW055	Ongoing Program & Marketing Tracking	No statewide or utility specific efforts are focused specifically on the industrial sector although current and ongoing MA&E activities are planned for the nonresidential sector. Regular market indicator tracking will facilitate continuous reassessment of program process and provide feedback to allow program implementers to quickly fine-tune programs throughout the year. The focus will be on industries and/or end-uses with large demand savings potentials and/or industrial markets currently perceived as under-served.	The ongoing research will track activity specifically related to the industrial market actor using data from current and ongoing nonresidential MA&E efforts. A series or set of industrial-sector specific MA&E activity reports will be presented as a result of this research. The value of this type of reporting will be examined over time to determine whether it is useful and necessary to track activity in the industrial sector separately from the nonresidential area overall.	PG&E	Rafael Friedmann	\$ 300,000	Pre-RFP	03/30/2002
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NONRESIDENTIAL	SW056	Compressed Air Persistence Study	This study is a continuation of a previous study that sought to examine on the ongoing basis compressed air systems by installing monitoring equipment. This study provides a relatively inexpensive way to determine the continued commitment of plant managers (and thus the persistence of energy savings) in using the results of the monitoring equipment in maintaining their facilities.	The results of this study will be used to determine the persistence of energy savings initiated as a result of installing monitoring equipment from previous programs and will be used to decide if the continued subsidy of this type of equipment is cost-effective for ratepayers.	PG&E	Rafael Friedmann	\$ 30,000	Draft Reporting	12/31/2001
<b>Total PY2001</b>							\$ 1,111,230		

*San Diego Gas & Electric Company's  
Statewide and Utility-Level Evaluation Projects*

<b>Study Area</b>	<b>Project ID</b>	<b>Project Title</b>	<b>Project Description</b>	<b>Project Objective (or milestone addressed for utility-level studies)</b>	<b>Lead Utility</b>	<b>Contact (Project/Area Manager)</b>	<b>Budget</b>	<b>Project Status</b>	<b>Expected Date of Completed Report</b>
<i>Statewide Studies PY 2000</i>									
RESIDENTIAL	SW010	Implementation of Phase 3 of the Round II Statewide Lighting & Appliance Study	Complete market effects studies that evaluate progress of these programs towards market transformation.	1) Collect pertinent data to track mkt indicators identified in Study Phase 1. 2) Assess mkt effects of energy efficiency programs by: documenting changes, estimating & quantifying hypothesized mkt effects through data collection, linking mkt effects	SDG&E	Rob Rubin	\$ 200,000	Completed	05/01/2001
<b><i>Sub-Total PY2000</i></b>							\$ 200,000		

**Utility-level Studies PY 2000**

RESIDENTIAL	US090	Energy Efficient Mortgages	Get a set number of customers to apply for an energy efficient mortgage	Count the number of applications for a home energy rating	SDG&E	Rob Rubin	\$ 70,000	Completed	05/01/2001
RESIDENTIAL	US091	Multi-family Property Owners Performance Contracting	Identify those who offer performance contracting to multi-family property owners/property managers	Count number of contractors offering performance contracting to this group	SDG&E	Rob Rubin	\$ 10,000	Completed	05/01/2001
RESIDENTIAL	US092	RCP Contractor Training	Contractors are trained in duct testing / whole system approach	Measure the number of contractors who complete training / demonstrate required skills by December, 2000	SDG&E	Rob Rubin	\$ 85,000	Completed	05/01/2001
RESIDENTIAL	US093	HVAC Contractor Training	Train contractors to properly use Manuals J & S	Measure the number of contractors who use Manual J & S correctly and compare to the 1999 Baseline.	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
RESIDENTIAL	US094	Residential Cross-Cutting	Measure the increase of customers who implement of those who receive information	Measure the increase of customers who implement of those who receive information	SDG&E	Rob Rubin	\$ 50,000	Completed	05/01/2001
NONRESIDENTIAL	US102	Evaluation of Large Nonresidential Comprehensive Retrofit Program - Seminar	Follow-up survey and analysis	Perform a market assessment and determine the number of seminar attendees that indicate a willingness to adopt energy efficient measures and techniques.	SDG&E	Andrew Sickles	\$ 50,000	Completed	05/01/2001

NONRESIDENTIAL	US103	Evaluation of Small Nonresidential Comprehensive Retrofit Program - High Efficiency Clothes Washer	Follow up survey and analysis	Perform a market assessment and determine the saturation of commercial high efficient clothes washers.	SDG&E	Andrew Sickles	\$ 50,000	Completed	05/01/2001
NONRESIDENTIAL	US104	Evaluation of Nonresidential HVAC Turnover Program	Follow up survey and analysis	Perform a market assessment and determine the ratio of high efficiency HVAC units stocked relative to standard efficiency units.	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
NONRESIDENTIAL	US105	Evaluation of Nonresidential Motor Turnover Program	Follow-up survey and analysis	Perform a market assessment and determine the market share (sales) of CEE rated motors	SDG&E	Andrew Sickles	\$ 70,000	Completed	05/01/2001
NEW CONSTRUCTION	US106	Market Assessment Study for Commercial New Construction Program - Whole Building Approach	Follow-up survey and analysis	Perform a market assessment and determine the number of design professionals that demonstrate key concepts of the training.	SDG&E	Kevin McKinley	\$ 50,000	Completed	05/01/2001
NEW CONSTRUCTION	US107	Market Assessment Study for Commercial New Construction Program - >5% over Title 24 Market Share	Cancelled in lieu of statewide study (SW015)	Perform a market assessment and determine the ratio of floor space (committed or planned) that exceeds Title 24 standards by 5% or more.	SDG&E	Kevin McKinley	\$ 125,000	Cancelled	

RESIDENTIAL	US119	Evaluation of Residential Lighting Fixture Manufacturers Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of fixture manufacturers offering energy efficient products	SDG&E	Rob Rubin	\$ 30,000	Completed	05/01/2001
RESIDENTIAL	US120	Evaluation of Residential Lighting Sales Associates Programs	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of lighting sales associates who are knowledgeable and aware of energy efficient lighting products, and the methods to convey information to customers	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US121	Evaluation of Residential Appliances Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star appliances	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001
RESIDENTIAL	US122	Evaluation of Residential Refrigerator Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the floor stock of qualifying Energy Star 2001 DOE compliant refrigerators	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001

RESIDENTIAL	US123	Evaluation of Residential Appliance Sales Associates Program	Initial and follow-up surveys and analysis	Perform a market assessment and determine if there has been an increase in the number of appliance sales associates who are knowledgeable and aware of energy efficient appliances	SDG&E	Rob Rubin	\$ 25,000	Completed	05/01/2001	
							<b>Sub-Total PY2000</b>	\$ 810,000		
							<b>Total PY2000</b>	\$ 1,010,000		

**Statewide Studies PY 2001**

RESIDENTIAL	SW051	Implementation of Phase 4 of the Round II Statewide Lighting & Appliance Study	Direction of Phase IV is to be decided based on phases 1-3.	0	SDG&E	Rob Rubin	\$ 350,000	Project Initiation	05/01/2
RESIDENTIAL	SW052	Residential Ceiling Fans	Determine the potential energy savings of residential ceiling fans to inform future program decision.	Determine actual run hours for fans and lights.	SDG&E	Rob Rubin	\$ 150,000	Data Collection	05/01/2
<b>Total PY2001</b>							\$ 500,000		

***Southern California Gas Company's  
Statewide and Utility-Level Evaluation Projects***

<b>Study Area</b>	<b>Project ID</b>	<b>Project Title</b>	<b>Project Description</b>	<b>Project Objective (or milestone addressed for utility-level studies)</b>	<b>Lead Utility</b>	<b>Contact (Project/Area Manager)</b>	<b>Budget</b>	<b>Project Status</b>	<b>Expected Date of Completed Report</b>
<b><i>Utility-level Studies PY 2000</i></b>									
NONRESIDENTIAL	US095	Advanced Water Heating Systems	Gather information and collect data to develop estimates of change in the market share of high efficiency water heaters in the small (core) nonresidential market.	The objective of this study is four-fold: 1) to establish the baseline inventory of the market share of nonresidential water heaters in existence in SCG's service territory, 2) to establish the existing ratio of high efficiency (i.e., greater than Title 24 standard) water heaters sold relative to the standard efficiency units, 3) to develop an estimate of the change in the ratio of high efficiency water heaters sold relative to the standard efficiency units upon implementation of the Advanced Water Heater Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential water heater applications, determining existing market barriers to adoption of high efficiency water heater designs.	SCG	Kevin Gerrity	\$ 40,000	Completed	12/31/2000

NONRESIDENTIAL	US096	Advanced Water Heaters and Space Heat Boilers	Gather information and collect data to develop estimates of change in the market share of high efficiency space heat boilers in the small (core) nonresidential market	The objective of this study is four-fold: 1) to establish the baseline inventory of the market share of nonresidential space heat boilers in existence in SCG's service territory, 2) to establish the existing ratio of high efficiency (i.e., greater than Title 24 standard) space heat boilers sold relative to the standard efficiency units, 3) to develop an estimate of the change in the ratio of high efficiency space heat boilers sold relative to the standard efficiency units upon implementation of the Space Conditioning Efficiency Improvement Program Element of SCG's Small Nonresidential Comprehensive Retrofit Program, and 4) with respect to nonresidential space heat boiler applications, determining existing market barriers to adoption of high efficiency space heat boiler designs.	SCG	Kevin Gerrity	\$ 40,000	Completed	12/31/2000
NONRESIDENTIAL	US097	Catalytic Infrared Heater Study	Baseline inventory of existing market share of catalytic infrared heaters used in industrial processes	Inventory of this type of equipment used in the industrial setting.	SCG	Kevin Gerrity	\$ -	Cancelled - Did not meet milestone	

NEW CONSTRUCTION	US098	Energy Advantage Home Market Effects Study		Program re-designed and obviated the need for this study.	SCG	Craig Tyler	\$ -	Cancelled		
RESIDENTIAL	US099	Residential Contractors Program Market Effects Study		This is being done in conjunction with SCE.	SCG	Craig Tyler	\$ -	Cancelled		
RESIDENTIAL	US100	Residential Upstream Water Heater Market Effects Study	Increase the number of plumbers/water heater installers employing 0.60+ EF units as their baseline by 100%	To measure the number of plumbers/water heater installers employing 0.60+ EF units as their baseline	SCG	Craig Tyler	\$ -	Cancelled - Did not meet milestone		
GENERAL PURPOSE	US101	Third Party Local Government Initiatives Evaluation	1/3 of local TPI projects must satisfactorily complete their deliverables/milestones	Determine what has been done and see if the deliverables have been completed through review of contract and submittal of invoices.	SCG	Craig Tyler	\$ 150,000	Completed	05/01/2001	
NONRESIDENTIAL	US124	Advanced Water Heating Systems - Phase II	Develop an estimate of the change in the ratio of high efficiency (i.e., greater than Title 24) water heaters sold relative to standard efficiency units in PY2000 due to the impact of SoCalGas's statewide Express Efficiency program.	Determine the percent of change of purchased high efficiency water waters.	SCG	Kevin Gerrity	\$ 35,000	Completed	05/01/2001	
							<b>Total PY2000</b>	\$ 265,000		

*California Energy Commission's  
Statewide Evaluation Projects and Data Collection Activities*

Study Area	Project ID	Project Title	Project Description	Project Objective (or milestone addressed for utility-level studies)	Lead Utility	Contact (Project/Area Manager)	Budget*	Project Status	Expected Date of Completed Report
<b>Statewide Studies PY 1999</b>									
GENERAL PURPOSE	SW020	Nonresidential Market Share Tracking	Tracking of nonresidential market decision factors and energy efficient equipment	Looking for adoption of energy efficient practices	CEC	Adrienne Kandel	\$ 1,010,000	Data Collection	06/12/2002
GENERAL PURPOSE	SW046	DEER Update	To update the residential and commercial measure cost portion of the database and energy savings and peak demand reductions data for the residential sector only.	To update the data needed for measure cost effectiveness evaluation.	CEC	Dennis Smith	\$ 350,000	Draft Reporting	08/01/2001
						<b>Total PY1999</b>	\$ 1,360,000		

**Statewide Studies PY 2000**

NONRESIDENTIAL	SW012	Literature Review of Existing Research.	Review CADMAC and other studies that overlap with nonresidential remodeling and renovation	Determine what information is available, where it is, and fill in gaps on nonresidential remodeling and renovation.	CEC	Sylvia Bender	\$ 50,000	Cancelled	
NONRESIDENTIAL	SW013	Nonresidential Remodeling and Renovation Study	Market characterization of the NR remodeling and renovation sector	Broad characterization of the nonresidential remodeling and renovation market	CEC	Sylvia Bender	\$ 200,000	Draft Reporting	11/01

GENERAL PURPOSE	SW044	California CEUS	The California CEUS will be the Commission's primary commercial building end-use research effort. It will: 1) Development of energy end-use estimates and end-use load profiles by commercial market segment 2) Development of end-use saturation estimates as input into the Commission end-use forecasting models 3) Development of a commercial market segment end-use disaggregation modeling system for use in conducting building energy demand analysis	The scope of this project is to 1) design a representative sample of commercial buildings and collect the required characteristic data, 2) construct calibrated engineering simulation models for individual buildings that are surveyed, and 3) organize the engineering simulation models in a batch environment for performing energy demand analysis	CEC	Mark Ciminelli	\$ 3,500,000	Data Collection	09/15/2003
RESIDENTIAL	SW047	Residential Appliance Saturation Survey	A survey of residential dwellings to collect appliance saturation and usage patterns.	Main objectives are 1) description of household demographics, 2) appliance saturations, and 3) electricity consumption (kWh and kW).	CEC	Glen Sharp	\$ 1,900,000	Project Initiation	06/30/2003
<b>Total PY2000</b>							<b>\$ 5,650,000</b>		

			Potentially this will be the project description: 4 specific mkts with substantial unmet potential will be selected. Avail info will be augmented with focus groups to characterize these mkts in depth with respect to mkt actors, motivations & barriers to adoption of economic EE technologies. The project will also assess whole bldg & end use energy savings and efficiencies of gut rehabs & shell completions. Gather attitudes & barriers specific to R&R mkt, cross-ck results w/ bldg surveys and DOE-2 simulations. Lastly, this project will gather specific info on opportunities to promote mkt transformation in the mkt of gas appliances.							
NONRESIDENTIAL	SW014	Phase Two Nonresidential Remodeling and Renovation Study	Examine opportunities for a systematic approach to mkt transformation surrounding event of R&R rather than appliance-based approach.	Direction of this study will depend on results of Phase one (SW013). This project has been cancelled.	CEC	Sylvia Bender	\$	-	Cancelled	
							<b>Total PY2001</b>	\$	-	

\*Budgets as shown for the CEC represent multiple budget years

**2000 - 2001 Statewide Projects - Rev. 7/12/01**

***Types of Evaluations within the Ongoing Statewide Projects\****

<b>Study Area</b>	<b>Baseline</b>	<b>Compliance</b>	<b>Impact</b>	<b>Market Assessment and/or Characterization</b>	<b>Market Tracking</b>	<b>Other Type of Project</b>	<b>Planning and Scoping</b>	<b>Process</b>
2001 Summer Initiative	1		1	1				
Project is cross cutting of current areas	1			2		2		
<b>RESIDENTIAL</b>								
Residential Retrofit, Renovation, and HVAC				1				
Residential Lighting and Appliance	1						1	
Residential Market Share Tracking	1				1			
<b>NONRESIDENTIAL</b>								
Large Nonresidential Retrofit and Turnover			1	2				1
Small Nonresidential Retrofit and Turnover	1			1				1
Nonresidential Remodeling and Renovation				1				1
Nonresidential Market Share Tracking					1			
Industrial	1			1	1			
<b>NEW CONSTRUCTION</b>								
Nonresidential New Construction			1	1	1			1
Residential New Construction	2	2	1	2				
Industrial/Agricultural New Construction								

Codes and Standards Support and Local Government Initiatives								
<b>All Areas</b>	<b>8</b>	<b>2</b>	<b>4</b>	<b>12</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>4</b>

## 200-2001 Statewide Projects

Project Type	MA&E Study Area	Project Number
Baseline	IND	SW021
	RLA	SW052
	RMST	SW031
	RNC	SW028
	RNC	SW050
	SI	SW049
	SNR	SW039
	XCUT	SW044
Compliance	RNC	SW028
	RNC	SW050
Impact	LNR	SW026
	NRNC	SW016
	RNC	SW050
	SI	SW049
Market Assessment and/or Characterization	IND	SW021
	LNR	SW024
	LNR	SW025
	NRNC	SW015
	NRRR	SW013
	RNC	SW028
	RNC	SW029
	RRR	SW032
	SI	SW049
	SNR	SW039
	XCUT	SW044
XCUT	SW048	

Project Type	MA&E Study Area	Project Number
Market Tracking	IND	SW021
	NRMST	SW020
	NRNC	SW015
	RMST	SW031
Other Type of Project	XCUT	SW046
	XCUT	SW047
Planning and Scoping	RLA	SW052
Process	LNR	SW026
	NRNC	SW016
	NRRR	SW053
	SNR	SW039

*Count of Statewide Studies by Entity and Status - 2000 and 2001 Funding*

<b>Utility</b>	<b>Pre-RFP</b>	<b>RFP out</b>	<b>Project Initiation</b>	<b>Data Collection</b>	<b>Analysis</b>	<b>Draft Reporting</b>	<b>Final Reporting</b>	<b>Workshop</b>	<b>Completed</b>	<b>Cancelled</b>	<b>Total</b>
CEC			1	2		2					2
PG&E			1	1	1	2	1				
SCE				5	1	1	1		2		3
SDG&E			1	1					1		
SoCalGas											
<b>Total</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>9</b>	<b>2</b>	<b>5</b>	<b>2</b>	<b>0</b>	<b>3</b>	<b></b>	<b>5</b>

*Count of Utility Specific Studies by Utility and Status - 2000 and 2001 Funding*

<b>Utility</b>	<b>Pre-RFP</b>	<b>RFP out</b>	<b>Project Initiation</b>	<b>Data Collection</b>	<b>Analysis</b>	<b>Draft Reporting</b>	<b>Final Reporting</b>	<b>Workshop</b>	<b>Completed</b>	<b>Cancelled</b>	<b>Total</b>
PG&E											
SCE*				2		1			6		1
SDG&E									15		1
SoCalGas									4		4
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b></b>	<b>6</b>

\*There is one study currently in a hiatus between phases that is not shown in this table.



**MA&E Timeline**

Study Area	Project ID	Project Name	2002				2003				2004	
			C	Q	C	Q	Q	C	Q	C	Q	Q
<b>PG&amp;E - PY 2000</b>												
NEW CONSTRUCTION	SW028	24		8/31								
NEW CONSTRUCTION	SW029	Construction		8/31								
NONRESIDENTIAL	SW021	Study		8/15								
NONRESIDENTIAL	SW039	Elements			12/31							
<b>PG&amp;E - PY 2001</b>												
RESIDENTIAL	SW049	Evaluation			12/30							
RESIDENTIAL	SW050	Program		8/31								
NONRESIDENTIAL	SW054	Studies				3/30						
NONRESIDENTIAL	SW055	Tracking				3/30						
NONRESIDENTIAL	SW056	Study				12/31						

**MA&E Timeline (Cont'd)**

Study Area	Project ID	Project Name	2001			2002			2003									
			Q	Q	C	Q	Q	C	C	Q	Q	Q	Qtr 1					
<b>SCE - PY 2000</b>																		
GENERAL PURPOSE	SW031	(2000)																
NEW CONSTRUCTION	SW015	Tracking																
NEW CONSTRUCTION	SW016	Assessment																12/30
NONRESIDENTIAL	SW023	Needs																
NONRESIDENTIAL	SW024	(EESP)																
NONRESIDENTIAL	SW025	Services																
NONRESIDENTIAL	SW026	Program																
NONRESIDENTIAL	US113	Survey																
NONRESIDENTIAL	US115	Study																
NONRESIDENTIAL	US116	Program																5/1
NONRESIDENTIAL	US117	AgTAC)																9/11
RESIDENTIAL	SW032	Decisions																7/15
RESIDENTIAL	SW033	(RCP)																6/30
RESIDENTIAL	US110	Milestone																4/1
RESIDENTIAL	US111	Milestone																4/1
RESIDENTIAL	US112	Study																5/1
RESIDENTIAL	US114	Report																5/1



Study Area	Project ID	Project Name	2002				2003						
			Q	Q	C	C	Q	C	Q	C	Q	Q	Qtr 4
RESIDENTIAL	US121	Program	5/1										
RESIDENTIAL	US122	Program	5/1										
RESIDENTIAL	US123	Program	5/1										
<b>SDG&amp;E - PY 2001</b>							5/1						
RESIDENTIAL	SW051	Study					5/1						
RESIDENTIAL	SW052	Fans					5/1						
<b>CEC - PY 1999</b>													
GENERAL PURPOSE	SW020	Tracking					6/12						
GENERAL PURPOSE	SW046	Update	8/1										
<b>CEC - PY 2000</b>													
NONRESIDENTIAL	SW013	Study				11/1							
GENERAL PURPOSE	SW044	CEUS											9/15
RESIDENTIAL	SW047	Survey											6/30

## **Section 8: Summer Initiative Programs**

SCE provides updates below of those Summer 2000 Initiative programs that were authorized on a utility-specific basis, or where SCE was designated as the lead administrator.

### **Refrigerator Recycling Program**

#### ***Program Element Summary***

In the August 21, 2000 Ruling of Assigned Commissioners and Administrative Law Judge on Summer 2000 Energy Efficiency Initiative, the Commission directed SCE to contract with the Appliance Centers of America (ARCA) to implement a Residential Refrigerator Recycling Program in the service territories of SDG&E and PG&E. In this Ruling, the Commission directed SCE to administer the program for SDG&E and PG&E for purposes of streamlining administration and oversight since SCE already works with ARCA on SCE's existing program.

The Residential Refrigerator Recycling Program targets residential customers in SCE, SDG&E, and PG&E's service territories and provides a cash incentive to customers for recycling their old, inefficient refrigerators or freezers. ARCA picks up the old appliance from the customer's home at no charge and recycles it in an environmentally safe manner. The old appliances are taken to a staging area where they are later trucked to ARCA's recycling facility located in Compton, California.

#### ***Activity, Accomplishments, Market Progress and Modifications***

The SI Residential Refrigerator Recycling program was completed in SCE's service territory at the end of 2000. SCE continues to offer a Residential Refrigerator Recycling program as part of its 2001 energy efficiency portfolio.

### **Pool Efficiency Program**

#### ***Program Element Summary***

The residential PEP! was "piloted" towards the end of summer 2000 by SCE, PG&E, and SDG&E, as a comprehensive swimming pool intervention strategy, designed as a rapid response to reduce demand and energy usage of residential pool pumps.

PEP! is a comprehensive set of swimming pool intervention strategies designed to reduce peak demand, energy consumption, and electric bills for consumers. It is designed to offer residential pool owners, who are receiving service on a non-time-of-use tariff, financial incentives for the purchase and installation of high efficient pool pump efficiency improvements and the re-set of pool pump timers to run during summer off-peak hours. The program also includes an informational element to help build consumer awareness of energy consumption with pools.

Market objectives include: (1) reduction of peak demand by encouraging the operation of pool pumps during off peak hours; (2) reduction in electricity consumption by encouraging the replacement of pool pumps or motors with more energy-efficient units; (3) increase in the consumer awareness of swimming pool efficiencies through an educational campaign directed at pool owners.

### ***Activities, Accomplishment, Market Progress, & Modifications***

As of May 31, 2001, when enrollment ended, more than 50,000 customers had enrolled in the pool timer program strategy to reset their timers to operate during off-peak hours. At the end of the second quarter, more than 25,000 customers have reserved rebate funds for the purchase of energy-efficient pool pumps and motors to save energy. Pump and motor rebates will continue through September 30, 2001 as part of SCE's 2001 energy efficiency portfolio.

## **Third Party Initiative Program**

### ***Program Element Summary***

SCE's Summer Initiative third party initiative (SI TPI) is designed to solicit innovative strategies and technologies from the marketplace. The significant difference for this solicitation, compared to traditional TPI solicitations, is the focus on projects that can be expected to achieve cost-effective peak demand reductions by June, 2001. Projects have a maximum award of \$850,000, and the total award amount for all projects is \$1,700,000.

### ***Activities, Accomplishment, Market Progress, & Modifications:***

Savings achieved through confirmed installations to date: 424 MWh of annualized energy savings and 0.1 MW of demand reductions. The following provides a summary on the progress the specific TPIs:

- A residential new construction initiative offering rebates for high-efficiency air conditioners has encountered severe marketing problems and has no committed or installed energy savings to date.
- A subsidized installation initiative for small/medium nonresidential air conditioning pre-coolers/subsidized installation program has encountered severe marketing problems and has no committed or installed energy savings to date.
- A residential audit and air conditioner rebate initiative has completed 5,000 audits to date, or about two-thirds of its proposed total, but to date has issued only 50 air conditioner rebate offers, has only 12 rebate reservations, and no installations of its proposed 180 high-efficiency air conditioners.

A subsidized audit and direct installation initiative for small/medium nonresidential lighting retrofits has now committed all of its funds with signed contracts and to date has installed 0.1 MW of demand reductions and 424 MWh of annualized energy savings. This is the one success story of the group, but it has angered some contractors who tried to offer retrofits with Express

Efficiency rebates, only to be undercut by the higher subsidy that this vendor could offer, and confused their customers.

## **LED Traffic Signal Rebate Program**

### ***Program Element Summary***

The LED Traffic Signal Rebate Program is a statewide program designed to encourage public agencies to replace incandescent traffic signals with efficient light emitting diode (LED) versions.

The program provides incentives for the following LED traffic signals:

- Red ball and arrow
- Green ball and arrow
- Amber flashing beacon
- Pedestrian hand
- Pedestrian hand/person combination

The program is designed to achieve demand reductions by June 2001; therefore, incentives of up to 100 percent of the hardware cost (installation cost and sales tax are the responsibility of the participant) will be offered for signals installed by this time. For signals installed after June 2001, incentives are reduced by 50 percent. Incentives are provided for hardwired fixtures only (as available) and must meet the maximum power demand ratings set forth by the program requirements.

### ***Activities, Accomplishment, Market Progress, & Modifications***

The three utilities held a number of planning meetings to coordinate this statewide offering. During this planning phase, discussions were also held with various stakeholders including cities and vendors to solicit ideas on incentive pricing, product availability, etc.

Per the schedule set by the Commission, the program was developed and introduced on September 11, 2000. Customer reservation forms were available as of this date. The first reservation was received on September 21, 2000. Program brochures and application materials were being developed through September 30, 2000. As a result of SCE's aggressive outreach during September 2000, the program was fully committed by October 2000. By mid-December 2000, the cities of Westminster and Fountain Valley had completed the retrofitting of all their traffic signals.

As part of SCE's 2001 program proposal, SCE plans to continue the LED-Traffic Signal program in coordination with a similar program offered through the California Energy Commission.

The year-to-inception results are summarized below:

- Total Incentive Budget Committed: \$7,500,000 (100% percent of total authorized budget)
- Total Energy Savings: 37,927 MWh

- Total Demand Reductions: 8.20 MW
- Thirteen cities have completed installation representing approximately 12,000 MWh of annualized energy savings and 3 MW of peak demand reduction. A number of cities are experiencing longer lead times (e.g., 4 months) for product than previously anticipated.

Although this Summer Initiative program is fully committed, SCE will continue a similar offering to cities through SCE's Express Efficiency Rebate program. Express Efficiency will continue to offer cities financial incentives, up to 50 percent of estimated hardware costs, to encourage the installation of LED traffic signals.

## **Campus Energy Efficiency Project**

### ***Program Element Summary***

The Campus Energy Efficiency Project provides a directed incentive for energy demand reduction projects at two campuses in SCE territory. The two campuses are California State University Long Beach (CSULB) and California State Polytechnic University Pomona (Cal Poly). (California State University Dominguez Hills originally proposed a project for this program but has since withdrawn.) CSULB is conducting lighting retrofit projects at several campus buildings for a projected demand reduction of 1,647 kW and energy savings of 3,692,664 kWh. Cal Poly is installing a thermal energy storage system and making modifications to their HVAC system campus for a projected demand reduction of 1,480 kW and energy savings 3,934,713 kWh.

The \$3.5 million incentive budget allocated to this program is split between the two campuses based on the projected energy savings. Incentives through this program will be paid to the respective campuses in increments of 50 percent up front, 40 percent at project completion and 10 percent upon delivery of a final project report. The final report will be used to report the results of the project and will include such information as project costs and actual per unit demand and energy savings.

### ***Activities, Accomplishment, Market Progress, & Modifications***

The Cal Poly Pomona and Cal State Long Beach projects were completed prior to June 1, 2001. The total savings for these two projects is expected to be 6,600 MWh of annualized energy savings with 3.1 MW of demand reduction. Both projects are pending the final distribution of funds, which will occur when the final report is received.

## **Hard to Reach Program**

### ***Program Element Summary***

- The program seeks to achieve peak demand savings through the installation of energy efficiency measures at multifamily apartment complexes, mobile home parks, and condominium complexes.

- Offers incentives (posted prices) for a wide variety of measures including: Energy Star lighting equipment, Energy Star refrigerators, Energy Star clothes washers, Energy Star dishwashers, HVAC equipment, thermal shell measures, water heaters, and water flow restrictors.
- Standardized statewide, including incentive levels, procedures, and contracts. The program is open to all project sponsors that have the appropriate licenses, bonding, certification, and insurance to perform the required work.
- Utility administers program; project sponsors identify and sell individual projects based upon an approved marketing plan.

***Activities, Accomplishment, Market Progress, & Modifications***

As of September 25, 2000, the utilities had filed and served a draft program design, including program manual, for the Hard to Reach Summer Initiative Program.

Based upon concerns regarding implementation issues associated with the initial program design the ALJ ordered that the utilities not accept applications until implementation issues are resolved. This triggered a reworking of the initially proposed program design. The program was redesigned based upon guidance from the Commission (Administrative Law Judge’s Ruling on Summer 2000 Energy Efficiency Initiative Issues Related to Implementation of the Hard to Reach Program) and was open for applications on November 8, 2000.

By February 2001, total program funds of \$2.6 million were subscribed with 10 contractors. The 10 contracts propose measures of lighting, duct testing and sealing, weatherstripping, water heater blankets, aerators and low-flow showerheads. As of the end of June 2001, 35% of the program budget had been paid to the project participants. That represents approximately 5,250 MWh of annualized energy savings and peak demand reduction of 2.6 MW.

<b>Beat the Heat</b>
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***Program Element Summary***

- Statewide program targets commercial and industrial users of halogen torchiere lamps and encourages them to replace those lamps with ENERGY STAR® models that save energy and demand, improve building comfort, and eliminate fire danger.
- Program also provides for recycling of halogen torchieres that are replaced.
- Ecos Consulting will provide this program in the service territories of PG&E, SCE and SDG&E. SDG&E will manage the contract with Ecos Consulting.

***Activities, Accomplishment, Market Progress, & Modifications***

As the program administrator, SDG&E successfully completed contract negotiations with Ecos on behalf of PG&E and SCE. A contract with Ecos Consulting was signed on September 11, 2000.

The research phase that involves characterizing the market and testing the hypotheses about the high incidence of halogen torchiere lighting in commercial spaces was completed. Research identified approximately 1,200 torchieres and thirteen potential participants. Survey results also

showed torchieres appear to be concentrated in fewer quantities and at smaller companies than was originally believed. An initial order of 3,840 replacement torchieres is currently warehoused at an Ecos Consulting facility in southern California.

To date, no energy efficient torchieres were installed in SCE's service territory as a result of Beat The Heat. SCE has received notification from the vendor, Ecos Consulting, that it is considering an orderly shut down of the Summer Initiative "Beat-the-Heat" Summer Initiative. SCE recommends that these funds be placed into the 2001 energy efficiency budget to extend programs that have or will exhaust their program budgets.

## COPE

### *Program Element Summary*

Under direction from the Commission under Decision 00-07-017, Pacific Gas and Electric Company contracted with COPE (the California Oil Producers Electric Cooperative) for peak demand reduction in for the summer of 2001. Under the contract, \$4,000,000 in funding is provided for COPE to run an incentive program for its members in the PG&E and SCE service territories. The program will focus on measures known to reduce peak demand: the contracted MW reduction is 4.6.

### *Activities, Accomplishment, Market Progress, & Modifications*

- 13 COPE members participated in the program, with seven companies doing projects in the PG&E service area, seven other companies doing projects in the SCE area, and one company had projects in both service areas.
- COPE members completed 33 projects at 570 sites, with 9 projects in the PG&E service area and 24 projects in the SCE area.
- Projects included pump off controllers (18), variable frequency drives (3), timer installation (1), pump optimization (5), plant facilities (4) and motor right sizing (2).
- Total incentives (excluding COPE's administrative costs) are \$1.6 million for PG&E projects and \$1.2 million for SCE projects.
- Estimated energy savings are 16.9 million kWh and 1,928 kW for the PG&E projects, and 12.3 million and 1,407 kW for the SCE projects. Total estimated energy savings are 29.2 million kWh and 3,335 kW (3.3 mW).
- Original projections were 34 million kWh and 4.6 mW.
- Total contract spending is expected to be \$3,500,000 compared to the budget of \$4,000,000.

**Table 8.1**  
**Summer Initiative Programs**  
**Budget and Expenditures - Inception-to-Date**  
**PY 2001**

Program	2000/2001 Authorized Budget	Inception-to-Date			
		Expenditures			
		Actual	Commitment	Total Actual + Committed	Utility Administrative Costs <sup>(1)</sup>
Beat The Heat	\$ 250,000	250,000	-	250,000	5,777
Residential Refrigerator Recycling	1,200,000	1,200,000	-	1,200,000	278,137
Pool Efficiency Program	3,000,000	74,267	2,925,733	3,000,000	273,769
Campus Energy Efficiency Programs [1]	3,500,000	662,628	2,837,372	3,500,000	5,720
Residential Hard To Reach	2,600,000	599,776	2,000,224	2,600,000	63,816
LED Traffic Signal Rebate Program	7,500,000	1,480,677	6,019,323	7,500,000	39,849
COPE	1,500,000	-	1,500,000	1,500,000	12,023
TPI Solicitation Process	1,700,000	377,243	1,322,757	1,700,000	37,729
<b>Total</b>	<b>\$ 21,250,000</b>	<b>\$ 4,644,591</b>	<b>\$ 16,605,409</b>	<b>\$ 21,250,000</b>	<b>\$ 716,820</b>

<sup>(1)</sup> Included as part of SCE's 2001 Energy Efficiency Budget

**Table 8.1**  
**Summer Initiative Programs**  
**Budget and Expenditures - Inception-to-Date**  
**PY 2001**

Program	Inception-to-Date					
	Actual		Committed		Total	
	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)	Energy Savings (MWh)	Demand Reductions (MW)
Beat The Heat	-	-	-	-	-	-
Residential Refrigerator Recycling	14,038	2.40	-	-	14,038	2.40
Pool Efficiency Program	3,146	41.65	-	-	3,146	41.65
Campus Energy Efficiency Programs [1]	6,600	3.10	-	-	6,600	3.10
Residential Hard To Reach	5,250	2.60	9,750	4.70	15,000	7.30
LED Traffic Signal Rebate Program	12,000	3.00	25,927	5.20	37,927	8.20
COPE	-	-	12,300	1.40	12,300	1.40
TPI Solicitation Process	424	0.10	3,055	2.30	3,479	2.40
<b>Total</b>	<b>41,458</b>	<b>52.85</b>	<b>51,032</b>	<b>13.60</b>	<b>92,490</b>	<b>66.45</b>

## **Section 9:           General Compliance Issues**

Decision 00-07-017 and subsequent Commission rulings and decisions set forth a number of compliance issues that SCE is required to address as part of the quarterly reporting of energy efficiency activities. The following section provides SCE's response to each of these Commission directives.

### ***Decision 00-07-017 - Quarterly Reporting Requirements***

#### **Ordering Paragraph 21:**

*For the RCP, the utilities shall establish a structured, periodic public process, such as workshops, meetings, and focus groups, to receive input and feedback from interested stakeholders, including third party providers and customers, a minimum of twice annually in each service territory. At least one public workshop shall be held in each service territory prior to filing the PY 2001 applications. They shall publicize and distribute proposed program changes prior to the information meetings, distribute adopted program changes to meeting participants and other interested stakeholders as they are made, and report on the process and results of the public forums in the Quarterly Reports. The public input sessions should be widely publicized.*

#### **Response:**

In 2001, the Commission is holding a series of "all hands" meeting to discuss the status of energy efficiency programs. These meeting were held on March 2, 2001 and April 19, 2001. At these public-held meetings, SCE presented the status of RCP along with specific programmatic modifications to RCP for 2001.

#### **Ordering Paragraph 29:**

*The utilities shall report on the statewide lighting and appliance programs in each of the Quarterly Reports and, beginning in PY 2001, shall endeavor, if feasible, to have the third party statewide contractor process rebates for Edison and SoCalGas.*

Response:

SCE's report on the statewide lighting and appliance program activities is presented in the Statewide and Crosscutting Section of this report.

**Ordering Paragraph 33:**

*PG&E and Edison shall continue their school-based education programs for PY 2001 and SDG&E and SoCalGas shall conduct pilot tests of these school-based programs in their service territories for PY 2001. The utilities shall monitor the effectiveness of the programs and the changes in awareness and behaviors attributable to the programs and report the results in the Quarterly Reports and in an evaluation report to be submitted to the Energy Division by December 1, 2001. The utilities shall explore the feasibility of a future statewide school-based education strategy using PG&E's and Edison's programs as models.*

Response:

SCE's status report on the school-based education programs is presented under the Residential Audit program discussed earlier in this report (See, Residential Program Area).

**Ordering Paragraph 37:**

*In the residential area, the utilities shall offer targeted solicitations to increase provision of energy efficiency services to under-served communities and customer groups already known or identified and include new targeted efforts in the PY 2001 applications, fully explaining the nature of the solicitations and rationale for choosing these efforts. Progress should be reported in the Quarterly Reports.*

Response:

SCE's progress on meeting the needs of hard-to-reach residential customers is described under the Residential program area.

**Ordering Paragraph 42:**

*The utilities shall continue efforts to design and implement program elements and intervention strategies to better serve the needs of smaller (small and medium) nonresidential customers and include a special progress report on these efforts as part of their PY 2000 and PY 2001 Quarterly Reports.*

Response:

SCE's progress on meeting the needs of small and medium nonresidential customers is described under the Small Nonresidential Comprehensive Retrofit program results (See, Nonresidential Program Area).

**Ordering Paragraph 50:**

*The utilities shall report funds spent and committed in the Quarterly Reports. The reports shall break out spent and committed funds and shall be provided by the fourteen programs as well as by strategy. The PY 2001 program applications shall show three years of comparison data.*

**Response:**

See the 2001 energy efficiency program year-to-date budget and expenditures shown in Table 6.1 of Section 6 within this report. The tables provide spent and committed funds by the fourteen programs as well as by strategy for the second quarter of 2001.

**Ordering Paragraph 66:**

*For nonresidential programs, the utilities shall continue to consider program offerings and increased funding for activities that benefit under-served markets and market segments. For PY 2001, the utilities, together with interested stakeholders, shall 1) develop common working definitions specifically for market segments consisting of smaller nonresidential customers and under-served market events such as remodeling and renovation; 2) assess the size and characteristics of those market segments, including remodeling, renovation, rehabilitation, and tenant change markets; 3) begin monitoring the availability and delivery of program services and participation using these definitions and report the results in the PY 2001 applications; and 4) offer new targeted solicitations to increase provision of energy efficiency services to under-served markets and market segments already known or identified and include new targeted efforts, fully explaining the nature of the solicitations and rationale for choosing these efforts, and reporting progress in the Quarterly Reports. The results of the needs assessment and monitoring shall be reported in the PY 2001 applications.*

**Response:**

SCE's progress on meeting the needs of small and medium nonresidential customers is described under the Small Nonresidential Comprehensive Retrofit program results (See, Nonresidential Program Area).

**Ordering Paragraph 68:**

*Within 30 days after the effective date of this decision, the utilities shall jointly submit a report to the Energy Division setting forth a coordinated plan for 1) notice of availability; and 2) distribution of the Residential and Business Energy Guides. The plan shall include both a statewide component for publicizing the availability of the Energy Guides, in English, Spanish, and Chinese, and local components for publicizing the availability of the Guides in all three languages and for distributing the Guides. The local component shall include plans for working with Community Based Organizations (CBOs) in publicizing and distributing the Guides and for distributing the Guides through home improvement stores and other appropriate distribution points. The utilities' plan shall provide for implementation as soon as the program is approved. The utilities shall include both descriptions of actions taken to publicize and distribute the Guides and the results of its actions in the Quarterly Reports.*

**Response:**

SCE's progress on the distribution of both Residential and Business Energy Guides are described in the Residential and Nonresidential Mass Market Information program (See, Nonresidential and Residential Program Areas).

**Ordering Paragraph 70:**

*The utilities shall continue coordination of the energy centers for PY 2000 and PY 2001, with particular emphasis on eliminating duplication. For PY 2001, the utilities shall prepare a plan for the accelerated commercialization of all products (especially software and design tools) developed at or through the centers and to distribute these products in a timely manner. Edison and SoCalGas shall take all reasonable efforts to ensure fuel-and-administrator-neutrality in the messages conveyed by the centers, and, for PY 2001, shall explore joint operation of their energy centers or conducting activities jointly at all centers. Edison and SoCalGas shall report on their efforts in the PY 2001 applications. The utilities shall report on the activities undertaken to coordinate the Energy Centers in the Quarterly Reports, specifically identifying actions taken to implement the directions set forth herein. For PY 2001, the utilities shall consider REECH's proposal for placing kiosks in home improvement centers and hardware stores, and in the PY 2001 applications, report the reasons such activities have or have not been implemented.*

Response:

A description of coordination activities are detailed in the energy centers program results within this report. In summary, three of the state's investor owned utilities, SCE, PG&E, and SoCalGas, operate energy centers.

**Ordering Paragraph 75:**

*For the rest of PY 2000 and for PY 2001, the utilities shall monitor their TPI solicitations and report in the Quarterly Reports any experience they have with the reluctance of third parties to participate in the TPI program because of our treatment of intellectual property.*

Response:

SCE has not experienced any reluctance from third parties to participate in the TPI solicitation process due to the treatment of intellectual properties.

**Ordering Paragraph 88:**

*The utilities shall jointly with interested stakeholders develop a schedule for a regular public input process, including workshops, meetings, and focus groups, and to do so in a manner that ensures timely input before decisions are made and feedback after decisions are finalized. The utilities shall report on the process and the results of the workshops, meetings, and focus groups in the Quarterly Reports. The Energy Division shall work with the utilities and interested stakeholders to develop a process for coordinating utility-sponsored sessions with Commission-sponsored workshops and for quickly reviewing and approving program revisions agreed upon in utility-sponsored sessions.*

Response:

The Commission has created monthly “all hands meeting” to discuss the progress of the 2001 energy efficiency programs. The Commission held meetings on March 2, 2001 and April 19, 2001. At these meetings, SCE presented its 2001 program modification and year-to-date program performance. These program modifications are shown in the program summary sections to this report.

### **Ordering Paragraph 91:**

*The utilities shall file Quarterly Program and Expenditure Reports with the Energy Division and serve the Reports on the service list for this proceeding. The Reports shall be filed as soon as possible but no later than six (6) weeks after the close of each quarter and shall contain:*

- a. The information and data provided for PY 1999;*
- b. Participation activity, budgets, and expenditures, including commitments, for 1) the 14 programs and all elements and strategies thereunder; 2) all statewide programs, broken down by the 14 programs and all elements and strategies thereunder; and 3) all cross-cutting measures broken down by the 14 programs and all elements and strategies thereunder;*
- c. Expenditures shall be itemized, at minimum, to show what the money was spent on, e.g., vouchers redeemed, workshops and training, promotional activities;*
- d. Tables shall be provided showing expenditures by customer class code, as described earlier;*
- e. A status update on all programs, program activities, program elements, and statewide MA&E studies, an update on statewide coordination activities, an update on market progress, and an update on all actions the utilities have been directed to take in this decision; and*
- f. Joint summary tables showing the requested data for the statewide programs.*

*The utilities shall meet and confer prior to filing the Quarterly Reports and shall adopt a common format. After receipt of the Quarterly Reports, the Energy Division shall develop and conduct a public process for review of the Reports.*

### Response:

After discussion with each of the utilities and the Energy Division on the content and format of the Quarterly Report and compliance with Ordering Paragraph 91, SCE submits this 2nd Quarter Report on the 2001 energy efficiency programs.

## ***Ruling On Cost Effectiveness Issues For PY 2001 Programs***

Dated: October 25, 2000

### Direction (pp.22-23):

The utilities should perform the saturation analysis as new data is obtained and, for all measures, at least annually, which should be reflected in the applicable Quarterly Reports and the Annual

Report. The utilities should update the saturation data in each quarterly report and the Annual Report.

Response:

SCE filed its saturation analysis in SCE's 2001 energy efficiency program application (A.00-11-043). No new data was obtained during the second quarter.

***Ruling On Summer 2000 Energy Efficiency Initiative***

Dated: September 7, 2000

Direction (p.7):

*Op 4 - Administrative costs incurred by the utilities, if any, shall come from program funds outside the \$67 million reserved for the Summer Initiative. The utilities shall separately track the administrative costs incurred for each and every Summer Initiative Program and report on those costs in all reports to the Commission, including quarterly progress reports and the annual reports. The reports shall provide a detailed breakdown of costs incurred.*

Response:

SCE's administrative costs incurred in support of the Summer Initiative is detailed in the Summer Initiative Section to this report.

***Ruling of Assigned Commissioners And Administrative Law Judge On Summer 2000 Energy Efficiency Initiative***

Dated: August 21, 2000

Direction (p.7):

*OP 13 - The utilities shall track and report on the progress of Summer Initiative programs in all reports to the Commission, including quarterly progress reports.*

Response:

The progress of SCE's Summer Initiative is presented in the Summer Initiative Section contained within this report.

***Decision 00-07-017 – 2001 Energy Efficiency Program Plans And Budget***

Dated: January 31, 2001

**Ordering Paragraph 8:**

8. The utilities shall provide estimations of energy demand savings for the first half of 2001 in their June quarterly reports.

Response:

SCE 2001 energy efficiency year-to-date results on energy and demand savings are shown in Table 6.2 of Section 6 to this report.